Partnering *by Design,* Not Default

A practical methodology for deciding when to partner and how to build a partnership that actually works

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DRAFT FOR FEEDBACK

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Authors

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Dr. Rajat Chabba is the Senior Director of Innovation and Partnerships at WDI. He plays a pivotal role for WDI building strategic partnerships and catalytic collaborations, with a particular focus on enterprise acceleration in emerging markets and strengthening innovation ecosystems. With almost two decades of experience across sectors such as women's health, infectious diseases, primary healthcare, climate health, eye care and sanitation, Chabba has collaborated with corporates, nonprofits, foundations, multilateral agencies, and governments to deliver developmental impact in resource constrained environments.

About The Partnership Lab

The Partnership Lab is an innovation lab that develops cross-sector partnerships that deliver health and business impact. We work with companies, governments, foundations, multilaterals and other partners to move collaboration from intent to implementation. Combining partnership strategy and design with the governance, financing and operating infrastructure needed for delivery, The Partnership Lab helps build partnerships that are faster to launch, built to work and designed to scale.

About the William Davidson Institute (WDI)

The William Davidson Institute at the University of Michigan (WDI) is a solutions driven non-profit operating at the intersection of education, entrepreneurship, and impact across emerging markets. WDI is dedicated to unlocking the power of business and markets to tackle critical global challenges and drive inclusive economic growth. WDI mobilizes entrepreneurs, investors, governments, and academia to drive pioneering solutions across sectors, with a focus on energy and e-mobility, climate-health, and health. Affiliated with the University of Michigan Ross School of Business, WDI harnesses the expertise of world-class faculty across campus to spark innovation and translate the latest research into bold, practical solutions for global development challenges in emerging markets.

Contents

The Partnership Paradox

The challenges facing global development at large, increasingly exceed the capabilities of any single organization. Capital, expertise, technology, policy authority, market access, implementation capacity and community trust are distributed across sectors, institutions, and stakeholders. *Partnerships have therefore become essential to how organizations pursue outcomes they cannot achieve alone.*

Partnerships are not new, but the environment in which partnerships are being built is rapidly evolving. Traditional funding models are being disrupted and expectations for locally-led solutions are shifting roles and decision-making power. Emerging technologies are changing what and how organizations can contribute. Climate, conflict, and other shocks are increasing the need and the pace to mobilize across institutional and sector boundaries. At the same time, organizations are under growing pressure to achieve more with fewer resources and demonstrate the value of how those resources are used. As the need for collaboration grows, partnership risks becoming a default response rather than a deliberate design choice. Organizations often move quickly to "who should we partner with?" and "how should we structure the partnership?" even before answering a more fundamental question: What specifically requires partnership in the first place?

This is the partnership paradox. Partnerships are necessary, however they also introduce coordination costs, slower decisions, competing incentives and organizational complexity. Therefore, we must methodologically assess the value of a partnership to justify the complexity of collaboration.

Drawing on existing research and practice, The Partnership Lab and WDI propose a practical V1.0 methodology for making partnership an intentional design choice. From determining if and when collaboration is necessary and what form it should take, to designing, testing, scaling, and adapting it over time. Version 1.0 is intentionally a starting point, shared as a draft for feedback rather than a finished methodology. It combines established practice with new decision logic and integrates measurement from the outset. This version will be tested with practitioners across sectors and partnership models, then refined based on what we learn through feedback and application, shaping its continued evolution.

METHODOLOGY

This methodology sets out the full set of decisions involved in developing a partnership, but the depth, sequence and pace of the process should reflect the circumstances. Not every partnership requires an extensive design process before action begins. The complexity of the challenge, maturity of the relationships, level of risk and urgency should determine how much work is required at each stage.

Building on what we know

Decades of research and experience on partnerships have generated important insights into what makes collaboration work, alongside an extensive set of frameworks, principles, diagnostics and tools to support practitioners.

The Partnership Lab and WDI reviewed nearly 50 sources spanning academic research, practitioner frameworks and toolkits, and applied partnership cases, including leading work from The Partnering Initiative (TPI), Business Fights Poverty, United Nations Department of Economic and Social Affairs, Wageningen University & Research, Bond, and other scholars and practitioners who have shaped the field of cross-sector partnership.[1] We also interviewed practitioners with hands-on partnering experience.[2] These conversations will continue at the 2026 United Nations General Assembly and beyond, sharpening our proposed approach with each round of practical insight.

Our review identified two persistent gaps:

First, there is a ***usability problem***. Many resources are long and comprehensive, steeped in theory, organized around partnership lifecycles, and contain an overwhelming number of frameworks, diagnostics and tools. Practitioners are left to determine what applies to their situation, when to use it and how to bring the outputs together. Often these frameworks are not practitioner-oriented and cannot be easily integrated into decision-making.

Second, the ***underlying decision logic remains underdeveloped***. The existing literature offers substantial guidance on how to design and manage a partnership once the decision to partner has been made. There is less practical guidance for the decisions that precede it: Is partnership actually necessary? What specifically needs to happen through collaboration? What level of interdependence does that require? And what partnership architecture is proportionate to that need?

Other gaps emerge within partnership design itself. Power asymmetry, for example, is widely acknowledged but less often translated into formal design choices. Without explicitly designing for that tension, organizations described as "partners" can function in practice more like prime contractors and sub-contractors.

THESE FINDINGS SHAPED OUR APPROACH AS WE SET OUT TO DO TWO THINGS:

1. Make the existing partnership knowledge, tools and resources easier to navigate and apply in practice
2. Propose new frameworks, principles and best practices where important design, implementation and decision gaps remain

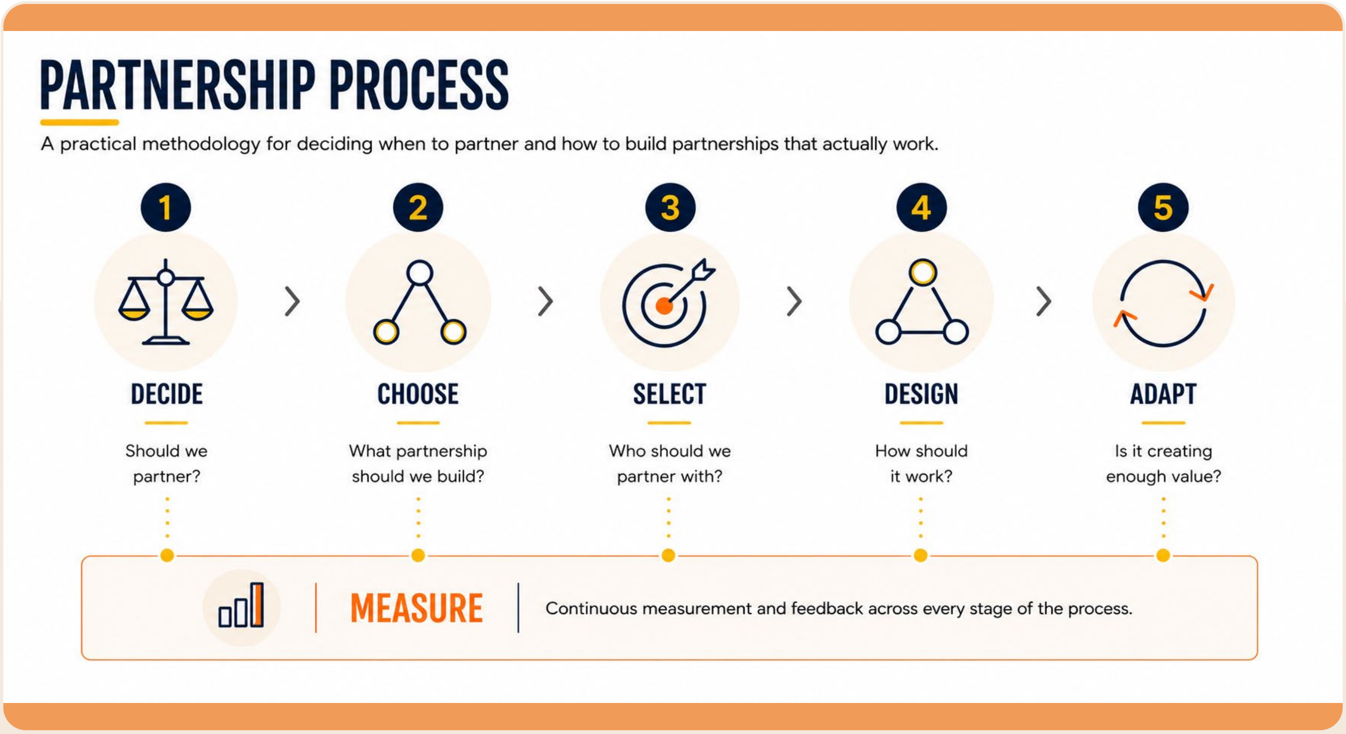
1. **A note on AI and our approach:** In developing Version 1.0, we used Claude and ChatGPT as supporting tools to help synthesize and summarize selected literature and to develop some of the graphics in this paper. The methodology, analysis and conclusions reflect the authors' judgment and were informed by the sources and practitioner perspectives referenced throughout.

This approach reflects the philosophy behind Version 1.0 itself: move quickly enough to contribute something useful, put it into practice, learn from it and improve it. Rather than wait for a perfect or exhaustive methodology, we are sharing a minimum viable version grounded in existing evidence and practice that can be challenged, tested and strengthened over time.

2. **Interviewees**: Andy Hoffman, (Holcim (U.S.) Professor of Sustainable Enterprise at the Stephen M. Ross School of Business and School for Environment & Sustainability at the University of Michigan; John Simon,Founding and Managing Partner, Total Impact Capital.

Partnership Process

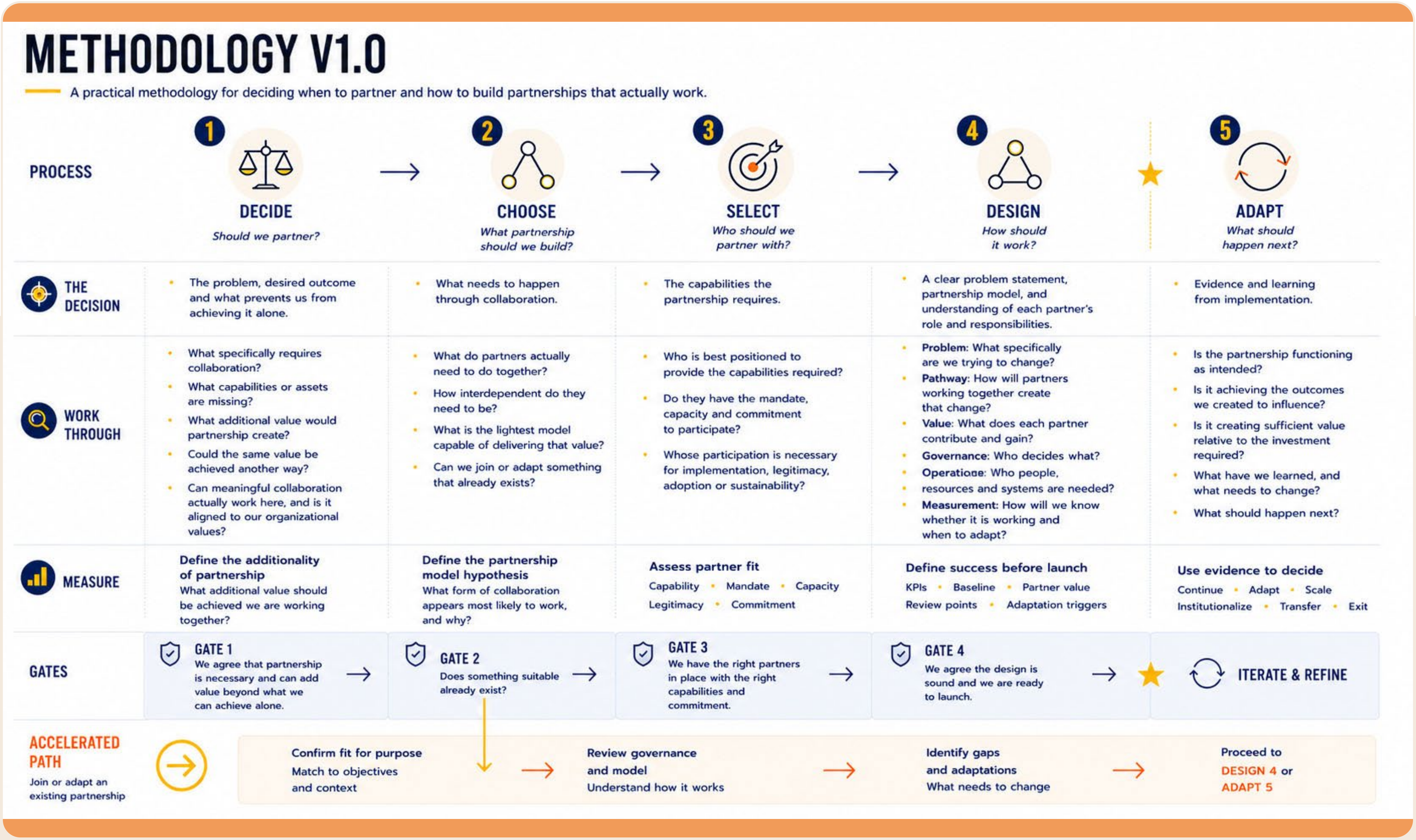
Rather than organizing the methodology around a generic partnership lifecycle, we built it around the decisions a practitioner actually needs to make:



Together, these steps bring greater discipline to how we decide when and how to partner. They do not seek to systematize the human relationships at the heart of partnership, but to provide a more rigorous way to make the decisions that surround them.

A practical V1.0 methodology for partnership design

We developed the Partnership Design Methodology V1.0 around the questions practitioners face as they move from an objective to a potential partnership. It begins with the problem—not a predetermined partner or structure—and progressively asks whether collaboration is necessary, what form it should take, which organizations should be included, how it should be designed, and whether it continues to create sufficient value.



01 DECIDE

SHOULD WE PARTNER?

Partnership should be a deliberate choice, not a default response.

Start with the problem the organization is trying to solve, the outcome it wants to achieve, and what prevents it from getting there alone. Our view is that complexity is not, on its own, a reason to partner. Neither is shared interest. Partnership should be a deliberate choice, tested through the following four questions.

A. Necessity: What specifically requires collaboration?

Identify what is preventing the outcome from being achieved independently. Which essential capabilities, authority, access, legitimacy, resources, capital or knowledge are missing or would create better approaches, and who holds them?

A strong case for collaboration exists when the critical factors are distributed across actors and need to be combined to achieve the outcome.

B. Additionality: What does partnership make possible?

The presence of complementary capabilities does not automatically justify a partnership. The next question is what becomes possible when those capabilities are brought together.

Existing partnership literature offers useful concepts here. TPI's "Collaborative Advantage" asks what unique value can be created by combining actors, while its "Partnership Delta" focuses attention on the additional impact generated through partnership compared with acting independently. The important discipline is to make that additionality explicit. What greater reach, capability,

legitimacy, innovation, efficiency or impact should exist because these actors are working together? Also important is being open to how a partnership may shape your organization in practice, from new ways of working and collaborating to changes in roles, processes, or priorities.

A partnership can create additional value and still be the wrong approach. The expected benefit should therefore be compared with other ways of achieving the objective. Could the organization deliver internally? Procure the missing capability? Provide a grant? Coordinate informally? Use an existing mechanism?

C. Feasibility: Can meaningful collaboration actually work here?

Finally, a compelling rationale for partnership means little if the participating organizations or surrounding context cannot support it.

This requires a practical reality check: Is there sufficient senior backing and authority to collaborate? Does your organization have the capacity and systems to participate (e.g., the legal, procurement, finance or other internal processes required to support it)? And are the external political, institutional and relational conditions conducive to meaningful collaboration? At this point, it is also important to establish the guardrails for the partnership.

MEASUREMENT

During this stage, measurement should be used to assess the validity and additionality of the partnership. Importantly, this is not a one-time decision. The original rationale and associated data should be revisited as the partnership evolves. Required capabilities may change, transaction costs may increase, or a simpler mechanism may become viable. The question "should we partner?" should remain open throughout the life of the partnership.

02 CHOOSE

WHAT SHOULD WE BUILD?

The partnership model should follow function, not convention.

Once there is a clear case for partnership, the next decision is what form that collaboration should take. Too often, partnership structures are chosen early, based on precedent, funding requirements, existing relationships or familiar models, rather than derived from what the collaboration actually needs to accomplish.

Our view is that the partnership model should follow function, not convention. Start with what actors need to do together, then consider how interdependent they need to be to succeed. The greater the interdependence, the more coordination, shared decision-making and formal structure the partnership is likely to require.

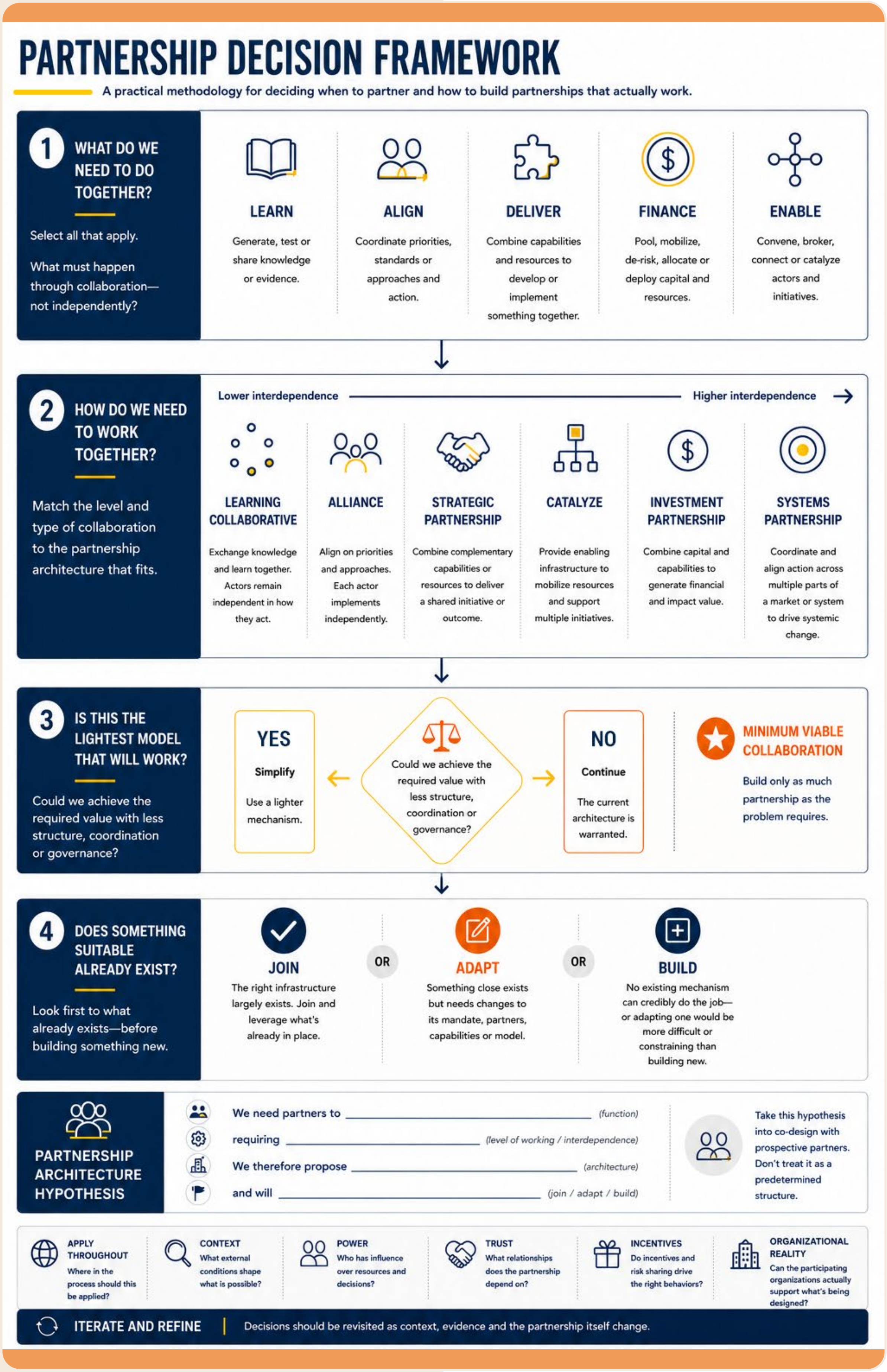
This can lead to different partnership models along a spectrum of interdependence. At the lighter end, networks or learning collaboratives enable actors to share knowledge and learn together while continuing to act independently. Alliances go further by aligning priorities or approaches while maintaining largely independent delivery. Strategic partnerships combine complementary capabilities or resources around a shared initiative or outcome. Platforms create a centralized structure for ongoing collaboration, with shared coordination, governance, financing or other backbone functions supporting multiple distinct initiatives. Individual initiatives may involve different partners, funders, activities and budgets, while benefiting from the common platform. Investment partnerships combine capital, capabilities and/or market access to create both financial and impact value, for example through joint ventures, blended finance, impact investment or other revenue-generating models. At the highest level of interdependence, systems partnerships coordinate action across multiple parts of a system to achieve change that no individual intervention can deliver.

These are not rigid categories, and one model is not inherently better than another. Partnerships may combine elements of several models or evolve over time. The objective is to choose the model that best matches what partners need to accomplish together, while avoiding unnecessary complexity. Partnership form should also reflect how value will be captured and shared: some collaborations are structured to generate revenue or share costs among partners—through co-investment, fee-for-service arrangements or blended finance—and that revenue model is itself a design choice that shapes governance, resource flows and incentives.

We therefore propose a principle of "minimum viable collaboration," that is, build only as much partnership as the problem requires. Before adding more partners, coordination or formal structures, ask whether the same objective could be achieved through a simpler arrangement or by joining or adapting something that already exists. Complexity should be added only where it creates additional value.

HYPOTHESIS

The result of this phase is a partnership architecture hypothesis, or an initial view of the form of collaboration most likely to work and why. It is deliberately a hypothesis—not a predetermined structure—and should be tested and refined with prospective partners through co-design.


PARTNERSHIP DECISION FRAMEWORK
A practical methodology for deciding when to partner and how to build partnerships that actually work.
1 WHAT DO WE NEED TO DO TOGETHER?
Select all that apply.
What must happen through collaboration—not independently?
LEARN
Generate, test or share knowledge or evidence.
ALIGN
Coordinate priorities, standards or approaches and action.
DELIVER
Combine capabilities and resources to develop or implement something together.
FINANCE
Pool, mobilize, de-risk, allocate or deploy capital and resources.
ENABLE
Convene, broker, connect or catalyze actors and initiatives.
2 HOW DO WE NEED TO WORK TOGETHER?
Match the level and type of collaboration to the partnership architecture that fits.
Lower interdependence
Higher interdependence
LEARNING COLLABORATIVE
Exchange knowledge and learn together. Actors remain independent in how they act.
ALLIANCE
Align on priorities and approaches. Each actor implements independently.
STRATEGIC PARTNERSHIP
Combine complementary capabilities or resources to deliver a shared initiative or outcome.
CATALYZE
Provide enabling infrastructure to mobilize resources and support multiple initiatives.
INVESTMENT PARTNERSHIP
Combine capital and capabilities to generate financial and impact value.
SYSTEMS PARTNERSHIP
Coordinate and align action across multiple parts of a market or system to drive systemic change.
3 IS THIS THE LIGHTEST MODEL THAT WILL WORK?
Could we achieve the required value with less structure, coordination or governance?
YES
Simplify
Use a lighter mechanism.
Could we achieve the required value with less structure, coordination or governance?
NO
Continue
The current architecture is warranted.
MINIMUM VIABLE COLLABORATION
Build only as much partnership as the problem requires.
4 DOES SOMETHING SUITABLE ALREADY EXIST?
Look first to what already exists—before building something new.
JOIN
The right infrastructure largely exists. Join and leverage what's already in place.
OR
ADAPT
Something close exists but needs changes to its mandate, partners, capabilities or model.
OR
BUILD
No existing mechanism can credibly do the job—or adapting one would be more difficult or constraining than building new.
PARTNERSHIP ARCHITECTURE HYPOTHESIS
We need partners to ______ (function)
requiring ______ (level of working / interdependence)
We therefore propose ______ (architecture)
and will ______ (join / adapt / build)
Take this hypothesis into co-design with prospective partners. Don't treat it as a predetermined structure.
APPLY THROUGHOUT
Where in the process should this be applied?
CONTEXT
What external conditions shape what is possible?
POWER
Who has influence over resources and decisions?
TRUST
What relationships does the partnership depend on?
INCENTIVES
Do incentives and risk sharing drive the right behaviors?
ORGANIZATIONAL REALITY
Can the participating organizations actually support what's being designed?
ITERATE AND REFINE | Decisions should be revisited as context, evidence and the partnership itself change.

03 SELECT

WHO SHOULD WE PARTNER WITH?

Who participates should reflect what the partnership needs to succeed.

The strongest starting point for partner identification is defining the capabilities the partnership requires to deliver its objective. Stakeholder mapping can then identify who holds those capabilities, as well as who has the influence, relationships, legitimacy or proximity to the problem needed for the partnership to succeed.

Beyond their capabilities, a prospective partner must also have leadership buy-in, organizational capacity, the ability to commit resources or make decisions, and fit with the political, institutional and relationship context in which the collaboration will operate. This may require actors with community trust, local knowledge or implementation relationships, including those without significant financial or institutional weight.

Partner fit should then be tested through early conversations. Before moving toward a formal partnership, prospective partners should explore whether they share a sufficiently common objective, understand what each expects to contribute and gain, and identify material differences in values, incentives or ways of working. This is also the point to assess potential financial, legal and reputational risks, including what association with each partner could mean for the others.

There is often a tension between formalizing too early and remaining informal for too long. Early conversations need enough flexibility for partners to explore fit without prematurely committing to a model. But as resources are committed, dependencies increase or partners begin representing the collaboration externally, expectations, roles and commitments should become more explicit. The path from exploratory conversations to formal partnership should therefore be deliberate, with clarity on what needs to be resolved before each partner is ready to commit.

Key questions to explore to identify partner organizations:

- Which actors are best positioned to contribute each capability?
- What mandate, capacity and commitment would each prospective partner need to participate effectively?
- Whose participation is necessary for implementation, legitimacy, adoption or sustainability and where might gaps in resources or influence limit someone's ability to participate meaningfully?

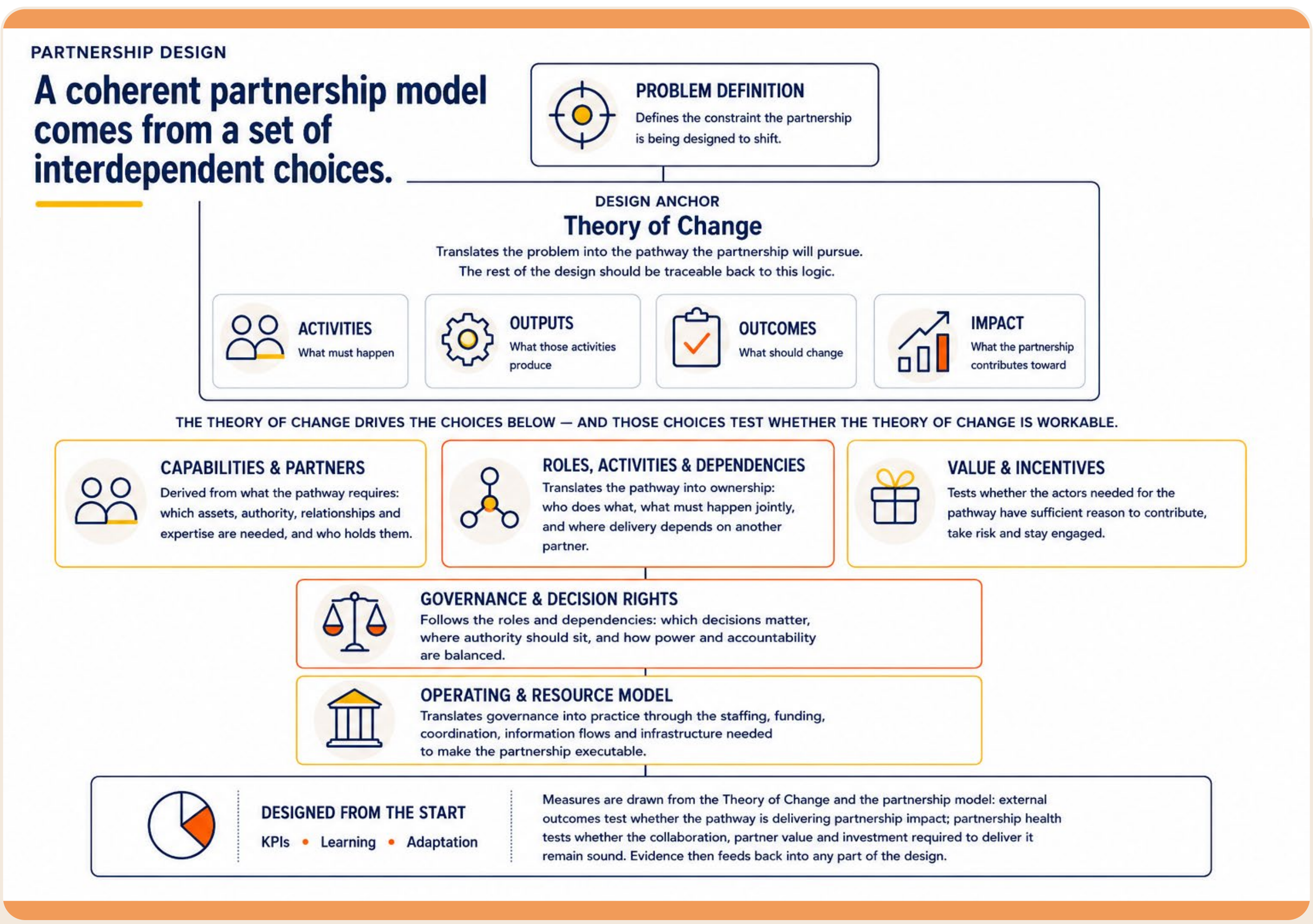
04 DESIGN

HOW SHOULD IT WORK?

The theory of change should act as the partnership throughline.

Once the form of partnership has been selected, the next challenge is to design how it will actually work. It's also the most extensive single step in our methodology. Choosing the partnership structure does not determine how the partnership will deliver. Partners still need to translate the objective into a coherent model that connects what they are trying to achieve with the activities required, the roles and contributions of each partner, how decisions will be made, how resources will flow, and how progress and value will be measured. This requires open and honest conversations about tradeoffs, and what each partner wants to get out of the partnership, as well as being clear about the partnership outcomes and what each partner needs to contribute.

These are not separate design decisions. They need to work together as a coherent system. The problem and pathway to impact determine the activities and capabilities required; the partners involved bring different capabilities, interests and sources of power; activities create roles and dependencies that need to be reflected in governance, decision rights and resource flows; and measurement tests whether both the partnership and its underlying logic are working as intended. A change in one part of the design can therefore have implications for the others. The design process should make these relationships and tradeoffs explicit, and revisit them as the partnership develops.



Problem definition

The quality of the partnership design depends on a clear definition of the problem. Broad formulations such as limited access, fragmented systems or insufficient financing provide little direction for what the partnership should actually do. The problem statement should identify the specific constraints to be addressed, distinguish underlying causes from symptoms, and reflect both available evidence and the perspectives of those closest to the problem. It should also be clear about what remains uncertain.

Key questions to explore to define the problem statement:

- What is driving the problem, and what are the most important underlying constraints?
- Which constraints can this partnership realistically influence?
- How is the problem experienced differently by the people and organizations affected by it?
- What do we still not know, and what assumptions are we making?

Purpose and theory of change

The theory of change should establish the partnership's specific contribution to addressing the problem. This distinction matters: An intervention may have a credible pathway to impact without demonstrating why collaboration is required to deliver it.

The design should therefore connect the constraints identified in the problem statement to the actions partners will take, the changes those actions are expected to produce, and the assumptions linking each stage. It should also make visible where outcomes depend on actors or conditions beyond the partnership's direct control.

Collaboratively working on the theory of change provides the opportunity for partners to understand the initiative in the same manner and translate each partner's capabilities into specific roles and accountabilities. These choices should then inform the partnership's governance and operating model.

Importantly, partnerships won't be linear in their achievements, so the theory of change should be treated as a living document, one that can be revisited and updated as the partnership evolves and new learnings emerge.

Key questions to explore the partnership theory of change:

- Which elements of the problem will the partnership seek to influence, and through what mechanism(s)?
- What must change as a direct result of partners working together?
- Which outcomes can the partnership directly influence, and which can it only contribute to?
- What assumptions does the model depend on, and which are most important to test?
- Where does working in partnership create value that would not otherwise be possible?

Partner value and incentives

Partnership design often focuses on collective value without making clear what each partner needs to gain. Yet, organizations enter partnerships with different mandates, incentives and constraints. The goal is not to align every motivation, but to design a model that creates sufficient value for each partner to participate and remain engaged.

Value should be considered alongside contribution, risk and influence. Significant imbalances can undermine the partnership even when partners remain aligned on the overall objective.

Questions to explore to identify partner incentives and individual value creation:

- What does each partner contribute and gain from the partnership?
- Where do partners' incentives align or diverge, and what does that mean for the partnership?
- How are costs, risks and influence distributed, and where could imbalances undermine the model?

Governance, power and decision rights

Governance is best understood as the allocation of authority, voice and accountability, rather than as a set of committees. Its design should flow from the decisions the partnership will need to make and the consequences those decisions will carry.

This makes questions of power unavoidable. Formal voting rights are only one source of influence; control over capital, contracts, information, relationships, technical expertise and agenda-setting can all shape whose preferences prevail. Effective governance makes these sources of power visible and determines how they should—and should not—translate into decision rights.

Questions to explore to design and manage governance and power structures:

- Which decisions matter most to the partnership and its partners?
- Who should decide, be consulted or be informed on each?
- Where are responsibility and decision-making power misaligned?
- How will disagreements or decisions that cannot reach consensus be resolved?
- When and how should governance and decision rights be reviewed or changed?

Operating model and resources

The operating model defines the practical systems and resources needed to run the partnership. Depending on the model, this may include dedicated staff or a secretariat, financial and accounting systems, grants or contract management, legal support, data and reporting systems, procurement, communications, and other administrative functions. The design should be clear about what is required, which partner will provide it, what needs to be built or procured, and how it will be funded.

The operating model must support collaboration as well as delivery. Coordination, facilitation, information flows, decision follow-through and relationship building,and management all require explicit ownership and capacity. Financial flows and staffing arrangements also shape power and behavior within the partnership, while building trust, resolving tensions and maintaining alignment require real time and resources. These should be designed and resourced deliberately, rather than treated as downstream implementation details or informal overhead.

Questions to explore when designing the operating model:

- What coordination and support are needed to run the partnership, and who will provide them?
- What financial, human and operational resources are required?
- How will funding and resources flow between partners, and what dependencies will this create?
- What internal processes or requirements could slow delivery or add unnecessary cost?

Designing for continuous measurement, learning and adaptation

Measurement should be designed from the outset, alongside the theory of change and partnership model. Key indicators can be incorporated into the theory of change to continuously track progress and identify potential risks throughout the partnership. These indicators can help guide conversations with partners and support a strong, responsive relationship. Being a good partner also means recognizing that challenges and shortcomings are a natural part of any partnership, and working collaboratively to understand and address them as they arise.

Partnerships need a small, decision-relevant set of KPIs that capture two distinct dimensions of performance.

- The first is whether the partnership itself is functioning as intended: the quality of collaboration, delivery against commitments, partner engagement, decision-making and the value partners derive from participating.
- The second is whether the partnership is contributing to the external outcomes and impact it was established to influence.

Partnerships also should be designed with what comes after them in mind. Where the objective requires lasting change, the design should consider what capabilities, financing, relationships, governance or local ownership will need to remain once the partnership ends. The aim is to avoid creating dependency on the partnership itself and strengthen the ability of the system and the actors within it to sustain progress over time.

Partners should establish when and how they will review performance, capture learning and reassess the partnership. This includes agreeing from the outset what evidence will inform decisions about changes to activities,

partners, governance or resources, as well as the conditions that could lead to transition or exit.

Questions to explore when developing the measurement strategy:

- What small set of indicators will tell us whether the partnership is working and achieving its intended outcomes?
- What value is the partnership creating for partners relative to the financial and non-financial investment required?
- When will partners review performance and learning, and how will that inform changes to the model?
- What would trigger a decision to continue, adapt, scale, transition or exit?

Co-design: Designing with partners and communities, not for them

A partnership should not be fully designed before the partners expected to make it work are involved. The initial problem definition and architecture provide a starting point, but they should remain open as partners bring different knowledge, constraints and interests into the process.

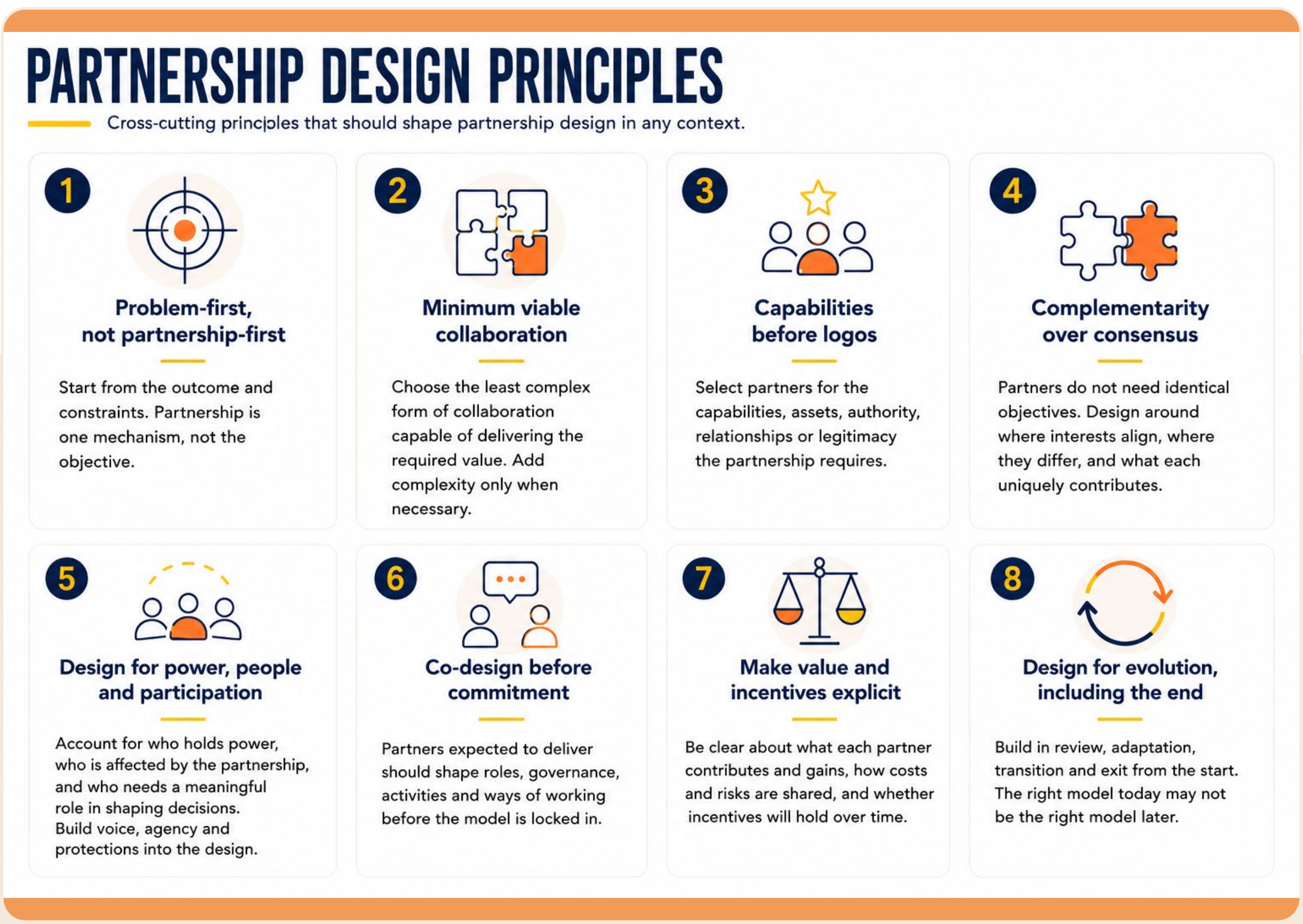
Partners work through the choices that will determine their ability to contribute and deliver: the outcomes they will pursue, what each will bring and receive, how responsibilities and resources will be shared, where decisions will sit, and how success will be judged. Some parameters may already be fixed (e.g. funding, geography, regulatory requirements)and being clear about those constraints is preferable to presenting decisions as open when they are not.

Good co-design does not require consensus on every issue. It should leave partners with a model they have meaningfully shaped, clarity on the trade-offs they have made, and confidence that they can work within the commitments that follow. It should create room for disagreement, particularly around incentives, risk, resources and power. These differences are often where the most important design choices sit.

CO-DESIGN TAKES TIME

Co-design cannot be compressed into a singular workshop. Building the trust required for partners to surface different interests, challenge assumptions and make meaningful commitments may take months, and in some cases years.

That time is part of the partnership design process. Early investment in relationship-building, in-person engagement, understanding individual and organizational motivations, and developing a shared vision can create the conditions for more substantive collaboration later. This is particularly important where partners have not worked together before, power is uneven, or organizations may simultaneously be funders, recipients, competitors, clients or collaborators.



05 ADAPT OR EXIT

WHAT SHOULD HAPPEN NEXT?

Continuation should be a decision, not the default.

At agreed points, partners should use the evidence and learning generated through implementation to make an explicit decision about the partnership's future.

The right decision may be to continue, change, scale, institutionalize, transfer or exit. Where responsibility is transferred or the partnership ends, the decision should consider whether the capabilities, financing, relationships, governance and ownership needed to sustain progress are in place.

Continuation should be a decision, not the default. Success is not necessarily a partnership that continues indefinitely, but one that creates lasting value and, where appropriate, leaves behind the capacity and ownership needed for that value to continue without it.

From Version 1.0 to practice

Partnership guidance is extensive, but often difficult to navigate and apply. Existing resources rarely follow the decisions practitioners actually face; strong individual tools do not always add up to a coherent approach; and some of the hardest questions around whether to partner, what form the partnership should take, and how to address power and competing interests remain less developed.

Version 1.0 is our attempt to close some of these gaps. It organizes partnership design around a clear decision path; connects choices about the partnership model, partners, value, governance and resources; and introduces practical decision logic for determining whether partnership is necessary, what level and form of collaboration is required, and how the resulting partnership should be designed and adapted over time.

What Version 1.0 does not yet address

Version 1.0 is intentionally a starting point, not a complete partnership management system. It focuses on the core decisions required to determine whether to partner, choose a model, select partners, design the partnership and decide how it should evolve.

There are areas it does not yet address in depth, particularly what happens once a partnership moves from design into day-to-day practice. These include how partnerships are formalized through contracts, scopes of work, standard operating procedures and ways of working; how partners navigate conflict, competition, changing incentives, turnover, scope creep, and difficult decisions; and how outcomes, learning, visibility and credit are shared.

What comes next will be shaped through testing and practice. The Partnership Lab and WDI will put Version 1.0 in front of practitioners across sectors, geographies and partnership models, including through an upcoming UNGA roundtable, to challenge the methodology, incorporate additional perspectives, identify what is missing and determine where deeper guidance or practical tools would add the most value.

HELP SHAPE WHAT COMES NEXT

Tell us what you like, what is wrong, what is missing or what you would challenge. Test the methodology in a live partnership and tell us where it works and where it breaks down. The next iteration should be shaped not only by the literature, but by the people actually making these decisions in practice.

Annex 1

LANDSCAPE REVIEW: SOURCES REVIEWED

To inform Version 1.0, The Partnership Lab and the William Davidson Institute reviewed academic literature, practitioner frameworks and toolkits, and applied partnership cases. The sources below informed the development of Version 1.0; inclusion does not imply endorsement of every framework or recommendation.

A. Academic and framework literature

#	SOURCE	AUTHOR / ORGANIZATION	YEAR
1	*Enhancing the Impact of Cross-Sector Partnerships: Four Impact Loops for Channeling Partnership Studies*	Rob van Tulder, M. May Seitanidi, Andrew Crane & Stephen Brammer, *Journal of Business Ethics*, 135(1), 1–17	2016
2	*Evaluating the Productivity of Collaborative Governance Regimes: A Performance Matrix*	Kirk Emerson & Tina Nabatchi, *Public Performance & Management Review*, 38(4), 717–747	2015
3	*Social Value Investing: A Management Framework for Effective Partnerships*	Howard W. Buffett & William B. Eimicke, Columbia University Press	2018
4	*Assessing Strategic Partnership: The Partnership Assessment Tool*	Brian Hardy, Bob Hudson & Eileen Waddington, Nuffield Institute for Health / UK Office of the Deputy Prime Minister	2003
5	*The Power of Partnerships: How Grant-Funded Multistakeholder Platforms Are Seeding Solutions to Address Complex Challenges*	World Economic Forum	2022
6	*Current Practice in the Evaluation of Cross-Sector Partnerships for Sustainable Development* (Working Paper No. 1)	Serafin, Stibbe, Bustamante & Schramm, The Partnering Initiative	2008

B. Practitioner frameworks, guides and toolkits

#	SOURCE	AUTHOR / ORGANIZATION	YEAR
7	*Business and the SDGs: A Framework for Action*	Business Fights Poverty / Jane Nelson, Harvard Kennedy School / SDG Fund	2015
8	*Investing for Impact: How Can We Collaborate to Unlock Investment to Deliver the SDGs in Challenging Places?*	Business Fights Poverty and partners	2017
9	*A New Global Partnership with Business: Building a Post-2015 Development Framework for Sustainable Prosperity in Africa*	Business Action for Africa / Harvard Kennedy School / The Partnering Initiative	2013
10	*Strengthening Markets Through Collaboration: How Large Companies Can Help SMEs Thrive and Build High-Performing Value Chains*	Christian Pirzer & Christina Tewes-Gradl, Endeva / Business Fights Poverty	2020
11	*Building Business Partnerships That Are Fit for the Future: A Renewed Vision for Business Action on Green and Inclusive Growth*	Business Fights Poverty Institute / Harvard Kennedy School	2023
12	*Better Together: Unleashing the Power of the Private Sector to Tackle Non-Communicable Diseases*	The Partnering Initiative / UICC / Bupa	2016
13	*Maximising the Impact of Partnerships for the SDGs: A Practical Guide to Partnership Value Creation*	Darian Stibbe, Stuart Reid & Julia Gilbert, The Partnering Initiative / UN DESA	2019

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15	*The SDG Partnership Guidebook: A Practical Guide to Building High-Impact Multi-Stakeholder Partnerships for the SDGs*, 2nd ed.	Darian Stibbe & Dave Prescott, The Partnering Initiative / UN DESA	2024
16	*Effective Consortia: A Guide to Emerging Thinking and Practice*	The Partnering Initiative / Bond	2021
17	*Bridging the Divide: Experiences and Emerging Good Practice to Strengthen Cross-Society Collaboration for the SDGs and Beyond*	The Partnering Initiative / Global Forum for National SDG Advisory Bodies	2026
18	*Partnership Matters: Current Issues in Cross-Sector Collaboration*, Issue 3	Leda Stott, The Partnering Initiative / University of Cambridge Programme for Industry / IBLF	2005
19	*Partnership Support Platforms for the SDGs: Learning from Practice*	Dave Prescott & Darian Stibbe, The Partnering Initiative / UN DESA	2020
20	*Philanthropy: Critical Activation of Public-Private-Philanthropic Partnerships (PPPPs)*	The Partnering Initiative	2023
21	*Collaborating for the SDGs: A Support System for Effective Partnering*	Dave Prescott & Darian Stibbe, The Partnering Initiative	n.d.
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23	*Trends in Cross-Sector Partnering for INGOs*	Bond / The Partnering Initiative	2020
24	*Partnering for Our Common Future: Optimising Mining's Partnering Capability to Contribute to Community Resilience and Thriving Societies*	ICMM / The Partnering Initiative	2021
25	*Backbone Organizations: A Field Guide – 27 Ways to Drive Impact in Multi-Stakeholder Initiatives*	CollaborateUp	n.d.
26	*The MSP Guide: How to Design and Facilitate Multi-Stakeholder Partnerships*	Herman Brouwer, Jim Woodhill, Minu Hemmati, Karèn Verhoosel & Simone van Vugt, Centre for Development Innovation, Wageningen University & Research	2015
27	*The Partnering Toolbook*	Ros Tennyson, The Partnering Initiative, with GAIN, UNDP and IAEA	2015
28	*Partnership Platforms for the Sustainable Development Goals*	UN DESA / The Partnering Initiative, 2030 Agenda Partnership Accelerator	2020

C. Applied cases and emerging practice

#	SOURCE	AUTHOR / ORGANIZATION	YEAR
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30	*Building and Scaling a Cross-Sector Partnership: Oxfam and Swiss Re Empower Farmers in Ethiopia*	Jonathan Doh & Ted London, WDI Publishing	2012
31	*Growing Better Together: General Mills Considers Pre-Competitive Collaboration to Advance Sustainable Supply Chains*	Amelia Brinkerhoff, Lisa Dinon, Conner Levy, Romain Malandre, and Amanda Willis, Andrew Hoffman,	2020
32	*Kellogg and Wilmar International: A Partnership Under Fire*	Andrew Hoffman, Jennifer Bowe, Nancy Gephart, Stephen Ahn, and Julia Winfield - WDI Publishing	2014

33	*Note on the Governance of Nonprofit Organizations: Lessons from Mayo Clinic*	Paul Clyde & Aneel Karnani, William Davidson Institute	2018
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35	*Building Transparency within the Sustainable Apparel Coalition: The Road to Successful Pre-Competitive Collaboration*	Andrew Hoffman, WDI Publishing / Erb Institute	2020
36	*Walmart and USAID: The Evolution of a Global Cross-Sector Partnership*	Ted London & Colm Fay, WDI Publishing	2015
37	*The NBCC a Year On: A New Blueprint for Rapid Collaboration?*	Business Fights Poverty / Harvard Kennedy School	2021
38	*Building Transformational Partnerships: The Case of Cargill and CARE*	Zahid Torres-Rahman, Michelle Grogg & Marcela Hahn, Business Fights Poverty	2018
39	*Exploring How Supply Chain Resilience Is Farmer Resilience: Mars and Tanager's Shubh Mint Programme*	Business Fights Poverty	2024
40	*Microsoft's Partnership Centric Culture: Lessons from a Decade of Using Cross-Sector Partnerships to Promote Universal Access to Digital Learning*	Serafin, The Partnering Initiative / IBLF	2010
41	*Pineapple Homes Consortium: A Partnership Blueprint to Overcome Market Failure and Scale Net Zero Retrofits in UK Social Housing*	The Partnering Initiative	2025
42	*Seeking Partnership Closer to Home: How South-South Cooperation Empowers Businesses in Developing Markets*	Martin Burt, NextBillion	2025
43	*Scaling Youth Entrepreneurship in Africa: A Multi-Stakeholder Approach for Developing Local Ecosystems*	Gregory Valadie & Juan Carlos Thomas, NextBillion	2025
44	*Public Good vs. Profitable Exits: Why Public Innovation Agencies Must Stop Copying Venture Capital*	Emre Eren Korkmaz, NextBillion	2025
45	*Scaling Through Consortiums: Five Lessons We've Learned About Growing Impact Collectively*	Emma Colenbrander, NextBillion	2026
46	*When Uncertainty Becomes Structural: Entrepreneurship Support Organisations as Ecosystem Infrastructure in a New Fiscal Reality*	Stephen Hunt & Nelson Okwonna, NextBillion	2026
47	*Turning Silos into Synergy: An Inclusive Finance Pilot Provides Lessons for Multi-Stakeholder Collaboration*	Seth Spiro & Moustapha Seck, NextBillion	2026
48	*Grant Dependency Is Undermining Global Development: Here's a Fundamentally New Architecture for Funding NGOs*	Rajat Ray, NextBillion	2026

Partnering *by Design*, Not Default

A practical methodology for deciding when to partner and how to build a partnership that actually works

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