

PARTNER ANALYSIS WORKSHEET

This worksheet is a tool to help facilitate alliance building with potential partners. Additional columns may be added if multiple partners are involved. This worksheet can be used to:

1. Prepare for a meeting with potential partners
2. Help assess fit between USAID and potential alliance partners by comparing interests, needs, objectives, issues, and resources.

TABLE 1: PARTNER ANALYSIS WORKSHEET TEMPLATE

Variables	USAID	Potential Partner (Company X)
Interests	<ul style="list-style-type: none"> • What are your mission/Strategic Objectives team's areas of interest? 	<ul style="list-style-type: none"> • What interests does the company have in your country? • Does it have any social initiatives? (Reference materials may include: company web site, annual report, corporate social responsibility (CSR) report, major press reporting on problems, business challenges etc.)
Needs	<ul style="list-style-type: none"> • Do you have budget needs that are unmet? • Do you have limited technical expertise in any areas? • Are project approaches lacking scale? • Has the mission developed workable solutions that could benefit from broader dissemination and replication? 	<ul style="list-style-type: none"> • Does the company need USG support? • Is the company trying to <ul style="list-style-type: none"> – Improve its image? – Improve its relationship with its local suppliers? – Expand its markets or extend its product offerings? – Collaborate on finding new solutions to business problems? – Need to share risk, responsibility and resources in addressing business challenge?
Objectives	<ul style="list-style-type: none"> • What are your mission's/team's objectives that can be advanced through an alliance with new partners? 	<ul style="list-style-type: none"> • What business objectives, community objectives, and broader corporate social responsibility objectives is the company trying to meet?
Problems/Issues	<ul style="list-style-type: none"> • Do you have budgetary limitations that hamper the impact of your programs? • Would private sector technical and managerial skills, products, services, supply chains, employment opportunities, etc. help you operationalize your objectives? 	<ul style="list-style-type: none"> • Is the reputation of the company at risk in your country? • Is the company concerned about its employee's health (HIV/Malaria, etc.) and looking to do something about it? • Is the company looking to improve its environmental practices but needs partners? • Are there public policy and rule of law issues the company would like to have addressed?
Assets/Resources	<ul style="list-style-type: none"> • What resources does your mission have to offer private sector partners—such as programs; activities; relationships with governments, NGOs, and community leaders; relationships with other U.S. 	<ul style="list-style-type: none"> • What assets beyond money can the company bring to the table—such as global markets for products, managerial skills, training capabilities, brick and mortar facilities, technology, etc.?

Variables	USAID	Potential Partner (Company X)
	Government organizations; monitoring and evaluation expertise; and knowledge of local players/environment?	
Planning for a Partner Meeting		
Meeting Purpose	<ul style="list-style-type: none"> • What is the purpose of the meeting? <ul style="list-style-type: none"> – Introductory/"get to know you" meeting – Brainstorming around a specific topic – Follow-up meeting – Project specific 	<ul style="list-style-type: none"> • Does the potential partner understand the purpose of the meeting? • It is important to gain clear agreement on the purpose of the meeting from the outset.
Meeting Agenda	<ul style="list-style-type: none"> • How long will meeting last? • What will be covered? • Will there be a presentation or handouts? • Who will lead the meeting? • Where will it take place? 	<ul style="list-style-type: none"> • What does the company want to talk about? • Does the company want to present? • How much time do they have? • Do they want to host the meeting or come to the USAID mission?
Meeting Participants	<ul style="list-style-type: none"> • Who should attend from USAID <ul style="list-style-type: none"> – Your SO team? – Other SO team members? – Mission Director or Deputy? – Washington offices dialed in? – Embassy representatives? 	<ul style="list-style-type: none"> • Who should be invited from the company: <ul style="list-style-type: none"> – Local representatives? – Company's headquarters dialed in? • Should third party stakeholders be invited (nongovernmental organizations, local business, government reps, other donors etc.)?
Desired Outcome From Meeting	<ul style="list-style-type: none"> • Is the objective only to open a dialogue? • Do you hope to get buy-in for a specific activity or program? 	<ul style="list-style-type: none"> • What do you think the company wants to get out of the meeting?
Meeting Follow-up Actions	<ul style="list-style-type: none"> • Who will be in charge of follow-up from USAID? • What are the specific action items—such as further discussions, more research, expanding ideas, bringing in other partners, Memoranda of Understanding, etc.? • Are there specific dates for completion of action items? • Do other SO teams or missions need to be involved in a follow-on meeting? • When will the next meeting be held, if appropriate? 	<ul style="list-style-type: none"> • Establish who the contact person is at the company. • Understand what the company's timeframe is for moving forward, if appropriate.

TABLE 2: SAMPLE PARTNER ANALYSIS WORKSHEET

Variables	USAID	Potential Partner (Company X)
Interests	<ul style="list-style-type: none"> • Improve access to primary and secondary education • Increase youth employment opportunities 	<ul style="list-style-type: none"> • Improve corporate image • Grow market share in East Africa
Needs	<ul style="list-style-type: none"> • Funding—budget of \$2.5 million; programs require \$5 million 	<ul style="list-style-type: none"> • Improved relationship with government
Objectives	<ul style="list-style-type: none"> • SO 12: Increase access to education by 10% for children 4-18 • SO 14: Increase youth employment opportunities ages 18-29 	<ul style="list-style-type: none"> • Improve corporate image by supporting youth programs
Problems/Issues	<ul style="list-style-type: none"> • Current budget is not sufficient • Existing partners bring same solutions as past 	<ul style="list-style-type: none"> • Poor relationship with NGO community; getting bad press. • Doesn't want to give its money directly to the local Ministry of Education.
Assets/Resources	<ul style="list-style-type: none"> • USAID influential with host country government • Strong relationships with NGOs and PVOs • Has budget to support educational programs • Convening power 	<ul style="list-style-type: none"> • Deep pockets with money set-aside for youth education programs • 20 offices throughout the country with conference space • Employees 2,000 locals and is looking to expand • Very good training program • Empowered local managers, who can make quick funding decisions
Limits	<ul style="list-style-type: none"> • Limited budget (\$2.5 million) • Limited ability to design new educational activities • Bureaucracy 	<ul style="list-style-type: none"> • Limited budget of \$3 million for youth programs • Doesn't have experience in youth education programs • Poor relationship with the community/ low level of trust
Planning for a Partner Meeting		
Meeting Purpose	<ul style="list-style-type: none"> • Introductory/"get to know you" meeting 	
Meeting Agenda	<ul style="list-style-type: none"> • Share USAID Mission Objectives and Programs • Learn more about Company's operations and CSR objectives • Identify follow-up action if necessary 	<ul style="list-style-type: none"> • Hosted at USAID • Company has 1 hour allocated
Invitees	<ul style="list-style-type: none"> • SO 12 Team Lead- Scott • SO 14 Team Leader- Karen 	<ul style="list-style-type: none"> • Company - Personnel Director • Company – Operations Manager • CSR Director- call in from NYC
Desired Outcome	<ul style="list-style-type: none"> • Identify areas of mutual interest • Discuss partnership ideas at a high level • Build relationship with key company officials (collect business cards) • Set-up a follow-up meeting to deepen discussion around potential 	<ul style="list-style-type: none"> • Learn about current USAID education projects • Find out who key contacts are at USAID/Build relationship with USAID staff • Identify ways in which they can work with USAID to improve their image

Variables	USAID	Potential Partner (Company X)
	alliance	<ul style="list-style-type: none"> • Set concrete action items and deadlines for moving forward
Follow-up Actions	<ul style="list-style-type: none"> • Determine timeframe for moving forward • Set up next meeting date • Identify USAID and Company liaisons. 	<ul style="list-style-type: none"> • Contact person = Personnel Director • Want to move forward as quickly as possible. Wants to announce partnership by end of fiscal year