



*The Coca-Cola Company*

In 2007, WWF and The Coca-Cola Company announced a groundbreaking partnership that has since inspired global cooperation in more than 50 countries across the globe. Creating a solid foundation for partnership required several years of planning and relationship building. This journey began in 2000 with exploratory talks about how we might work together. Our relationship evolved from donor and beneficiary, to collaborators, and finally, to partners.

From our experiences, we have developed the Engagement Checklist below to help guide NGOs and corporations through the process of partnering together – from initiating the work through evaluating progress. We hope this information will be useful in understanding how to grow and evaluate partnership work, helping plan and structure new approaches, and training new employees. We continue to learn from each other on how to make this and potentially other partnerships more successful for all involved. We will update this checklist periodically as we discover new insights in what works and what doesn't.

The questions included are general guidance. You might need to consider additional questions that will help you evaluate and move forward with a partnership.

## Step 1: Choosing a Partner

So you want to reach across sector lines to secure freshwater resources? The first step is identifying a partner that has enough shared interests to make progress.

- Are you ready to partner?**
  - Do you have enough resources/staff capacity to invest in making a partnership work, as well as making change on the ground?
  - Do you know who within your organization needs to be engaged to ensure top-level support?
  
- Where do you want to focus?**
  - What geographies are most important to your organizational goals?
  - What industries or activities influence the issues you care about?
  - Who are the key actors in those areas?
  
- Why would a potential partner care?**
  - Why would the key players want to act on the issues you want to address?
  - Can you communicate it in a way that makes sense to them?
  - Can you explain your organization's value-add in their language?
  
- Are you time-bound?**
  - Generally, the larger the organization or more profound the goals, the longer it will take to build a meaningful partnership that generates change.
  
- Have you identified a connection?**
  - Have you identified people within the organization that you would like to have a conversation with?
  - Are there opportunities to present or share your thoughts with key players, including at conferences or through industry groups?

## Step 2: Initiating a Partnership

At this phase, there is no formal partnership in place, though you might be having conversations with a potential partner. You should begin by understanding your own organization – its processes, strengths, goals (mission/business), capacity and how it is perceived -- and then evaluate the potential partner for proper fit and added value.

### Do you understand your own organization?

- Have you reviewed your own organization's vision, mission and/or goals to understand how a potential partnership might help to achieve those goals?
- Have you researched within your own organization to understand any protocols for reaching out to potential partners?
- Have you investigated whether there is someone in your organization who might have expertise, guidance or an established relationship to offer you regarding outreach or joint work with the potential partner?

### Do you understand your potential partner?

- Have you researched your potential partner's vision, mission and/or goals to understand how your organization might add value to the partner?
- Have you researched the organization online and read pertinent documents such as their annual report?
- How is the organization structured?
  - How are the responsibilities for implementing goals divided across different business units, programs or offices?
  - How are resources allocated?
  - How and when does the potential partner make decisions (e.g., budgetary, strategic)?
  - How do they set their strategies around environmental issues (note: this could encompass public affairs, sustainability, philanthropic or other departments)?
  - Are you targeting the right contacts in the organization?

### Do you understand how and when your vision and those of your potential partner overlap?

- Where is there potential alignment?
  - Do locations of offices, operations and/or priorities align with yours?
  - Are issues such as climate change or water scarcity/availability likely to impact both conservation priorities and the direct operations of the company?
  - Can the work go beyond "operational" to address future risks/trends?

### Where are there potential conflicts?

- Not all conflicts are equal and not all are deal-breakers; there is room to agree to disagree on certain issues but it is important to fully recognize, discuss and agree how you will communicate on these issues.
- For a non-profit,
  - Do you understand the impact that the company's operations have on your conservation priorities and your mission?
  - Can you reach internal alignment with key stakeholders in your company to partner with this organization? Are issues such as climate change or water scarcity/availability likely to create conflict between conservation priorities and the direct operations of the company?
  - Does the company's use of resources, such as water, in their direct operations or supply chains

expose them to regulatory or reputational risks in communities and other places of importance to your organization?

- Are the priorities for potential partnership work such that you will make a meaningful difference to any of these potential issues (impact, scale, reputational)?
- Is it clear that working with the company to improve their sustainability is not an endorsement of their product or service?

**For a company,**

- Do you understand where the organization's conservation priorities are and how those priorities might impact your company's operations
- Can you reach internal alignment with key stakeholders in your company to partner with this organization?
- Do you have the resources (e.g., time, people with right capacity and funding) to support such a partnership?
- Are issues such as climate change or water scarcity/availability likely to create conflict between the direct operations of the company and conservation priorities?
- Do the places of importance to the organization potentially conflict with your operations or supply chains exposing you to greater regulatory or reputational risks?
- Are the priorities for potential partnership work such that you will make a meaningful difference to any of these potential issues (impact, scale, reputational)?

**Do you understand the potential upsides and risks to a partnership?**

- How can you add value to the work of your potential partner?
  - Do you have technical knowledge or skills that your potential partner doesn't?
  - Do you bring additional financial or human resources to the partnership?
  - Do you bring scale to the partnership to the extent that you can make a meaningful impact (e.g., leveraging your business and conservation partners such as customers, suppliers and other NGOs)?
- Do you understand the full value that the potential partner can bring to your work?
  - For a non-profit,**
    - Beyond funding, have you thought how a company might contribute to your conservation goals (e.g., changing procurement policies, adopting an operational footprint target)?
    - How might the potential corporate partner help you amplify key conservation messages?
    - Could your potential corporate partner connect you to other key stakeholders in the places where you work?
  - For a company,**
    - Are there opportunities for joint communication or outreach to communities?
    - How might the potential non-profit partner help you understand and mitigate risks to your operations or supply chains?
    - Could your potential non-profit partner connect you to other key stakeholders in the places where you work?
    - Are issues such as climate change or water scarcity/availability likely to create conflict between the direct operations of the company and conservation priorities?
    - Do the places of importance to the organization potentially conflict with your operations or supply chains exposing you to greater regulatory or reputational risks?
    - Are the priorities for potential partnership work such that you will make a meaningful difference to any of these potential issues (impact, scale, reputational)?

- Have you completed research (i.e., due diligence) to understand any risks to your organization that might result from a potential partnership?
  - How might your stakeholders view the partnership?
  - Are there resources you could lose by partnering?

**Have you found your champion?**

- Is there someone in your partner's organization that believes strongly enough in the partnership that he/she will help usher it through internal processes? Keep in mind this person's position will vary depending on the organization's structure and culture, and it may not be the first person you talk to.
- Have you equipped your champion with language that explains your organization and the potential partnership in a way that others in your partner's organization will understand?

## Step 3: Picking the Right Strategy

In this phase, it is important to have a common understanding of what you want to accomplish together, the activities you will undertake and how the partnership will progress. It is essential that all parties commit to the shared vision, manage expectations and monitor success so that everyone feels a sense of accomplishment during the partnership. For new or hesitant partnerships, define ways to start small that immediately demonstrate success. Also, accept that relationships take time to grow and advance. Not every issue or opportunity will be undertaken at the start.

### What are the partnership's vision, mission and/or goals?

- What is the "problem" that you are both trying to solve?
- Do you share a vision, mission and/or goals for the same reasons or for different reasons?
  - Where is there overlap?
  - Where is there potential conflict?
- What are the key deliverables or milestones for each goal?
  - How will your organization help deliver those goals?
  - How will your partner organization deliver upon those goals?
- Do you collectively have enough resources to see results – people, subject matter experts and budget? If not, do you have a plan to get those resources?
- Have you prioritized the work to determine which projects are the most important or viable to the partnership?

### What is the project work plan?

- Are projects being developed?
  - Are their clear roles, responsibilities, budgets and schedules in each organization?
  - Is your timeline realistic?
  - Have both partners agreed on the metrics by which success will be measured?
  - Do you need stakeholders' buy-in and support for the project?
  - If so, has pertinent information been shared with them?
  - Can both organizations meet their individual goals while the partnership maintains its targets?
  - Can you describe what a successful outcome looks like and why you are pursuing certain strategies?
  - What kind of information and how much of it do you need to determine if the work plan is on track?
  - Are there internal or external constraints that may impact your success?
    - Are they within your control?
    - Are they beyond your control?
- Do you have a communications plan in place?
  - How will you share information with your partner?
  - How will you report on progress?
  - Will you be publicly reporting on results?
  - Have you and your partner agreed about the key audiences?
  - Have you and your partner agreed about key messages?
  - How will you capture success stories?

- Who will ensure project progress?
  - Who in the organization will carry the project forward on a day-to-day basis?
  - Do you have the right staff in place, with the right skills, to help ensure the project is successful? If not, will you provide training or hire new staff?
  - How are you ensuring that if key personnel leave the partnership, the projects will continue to progress?

# Step 4: Building Trust

Throughout the partnership, but especially in the beginning, it is important that both organizations have mutual respect and can openly communicate with each other. The foundation for this trust has been set by the shared vision and goals of the partnership. You should openly share information, goals, objectives and potential roadblocks to success, and encourage the same from your partner.

- Do you have a detailed internal communications plan in place?**
  - How often do you and your partner need to communicate internally about the project?
  - Who needs to be involved in the various communications?
  - What methods should be used to communicate (e.g., in-person meetings, phone calls, email, intranet sites), and how often?
  
- Are you providing useful information along the way?**
  - Are you communicating how the partnership is valuable to you?
  - Have you adequately considered how to communicate results that are important to your partner's goals and not just your goals?
  
- Are you maintaining an open relationship?**
  - Are you regularly operating in an open-minded way, understanding that both groups have good intentions but have very different core missions?
  - Do you have a plan to address sensitive issues?
  - How will you resolve conflicts of interest, if they arise?
  
- Are you cultivating personal relationships across teams and across organizations?**
  - Are you visiting field projects together?
  - Are you visiting the company's operations together?
  - Are you celebrating accomplishments along the way?
  - What more can you do in meetings with the partner to encourage people to get to know each other and learn from each other?

# Step 5: Managing the Relationship

A key to success is having well-informed staff in both organizations. Those who are managing the relationship or responsible for carrying out the work need to have access to and be informed of key successes, issues and new information. At this point in the relationship, the focus is primarily on ensuring that both parties are delivering the agreed-upon goals on time and as expected. An additional point of emphasis should be to monitor for trends/shifts that may impact the partnership or the partners. Opportunities to grow or expand the relationship can also be explored.

- Have you defined rules and protocols for the partnership across critical areas, including:**
  - Communicating internally (among the team and to leadership)
  - Reporting on progress
  - Addressing changes or delays
  - Addressing sensitive issues that may occur beyond the bounds of the project
  - Engaging new stakeholders
  - Marketing and branding
  - Confidential and/or proprietary information
  - Communicating externally
  
- Are you tracking progress toward targets and goals?**
  - Does each partner's staff have access to the work plan?
  - Do these staff members have the internal and external relationships and resources to meet the work plan goals?
  
- Are you implementing the detailed communications plan?**
  - Do you have a clear schedule established to meet with your partner, maintain a dialogue, and report on results?
  - Are you adequately communicating with your partner?
  - Are you assessing how often you need to report on progress?
  - Do staff of both organizations know about and use the communications and reporting protocols?
  
- Have you planned for project implementation?**
  - Have you established joint guidelines (e.g., specific actions, timelines, milestones) for engagement?
  - Do you have key individuals (i.e., decision makers) within each organization in agreement with the potential partner, process and approach?
  - Do you need a contract or letter of understanding that defines the body of work? Or, if the relationship is more philanthropic, a draft proposal that articulates the goal, timeline and supporting activities?
  - Have you defined metrics for success and/or monitoring and evaluation of the project?
  
- How are you informing new staff who will work on the partnership?**
  
- Are you capturing good visuals (e.g., pictures and video) that can be used to illustrate success and tell a compelling story?**

- Are you tracking changes in your partner's organization and how these internal shifts could impact your organization and the partnership?**
  - How are goals and environmental concerns evolving at your partner's organization?
  - Have there been changes in senior leadership?
- Are you tracking external trends and world events and how these shifts could impact your organization and the partnership?**
- Are you giving your partner what they need to continue to support this project?**

## Step 6: Growing the Work

During project implementation, you should look for opportunities to expand the work and impact. Examples could include taking a small project and extending its reach or expanding it to a new region. Alternatively, you can consider addressing issues that you were not able to explore at the start of the relationship or, perhaps, given the history of work, you may be in a position to go “bigger” or “deeper.” In addition, with a history of documented success and specific progress, the partnership should also think actively about communications and how to tell conservation stories. A conservation story highlighting progress on the ground can be more powerful than statistics, and can be a strategic tool for communicating the benefits and complexities of conservation results.

- Can you grow your current set of projects to have broader impact?**
- Can you add a new project or element?**
- Are there opportunities to bring in additional partners to expand impact?**
- Can you recruit your partner to support other relevant projects that are important to your organization?**
- How can you communicate your progress to achieve more results?**

# Step 7: Evaluating Progress

The standard timeline for measuring progress can vary between a company and a conservation group. In business, resources are dedicated, a return on investment is calculated and results are deemed a success or failure. In conservation, targets are set and progress and impacts are monitored. Progress in conservation can take longer to measure, so it is important to establish agreed-upon metrics by which progress will be measured. Keep in mind that “perception is reality.” If you are not communicating progress and results to the partner, stakeholders and communities, then no one will not be aware that progress has been made and results achieved. Always consider how your partner perceives the relationship and project progress. This step can and often should be folded into the “Managing the Relationship” step on an ongoing basis.

## **How is project progress being monitored?**

- What kind of information and how much do you need to determine if the work plan is on track?
  - What conservation metrics have you defined to evaluate success?
  - What business metrics have you defined to evaluate success?How can you communicate your progress to achieve more results?
  - What shared metrics have you defined to evaluate success?
- Are you testing assumptions made in the development of the project plan?
- Do you still have the right human resources?
  - Do personnel who are responsible for implementing have that responsibility built into their job descriptions?
  - How many people in each organization are working directly and indirectly on the partnership?
- Is your budget matching up to your activities, so the activities and expectations are aligned with current resources, and not resources that you're anticipating?

## **Are there any obstacles to success?**

- How can these be addressed if work is expanding?
- How can these be avoided in future projects with other partners?

## **Are you communicating results?**

- Are you communicating results to your partner?
- Are you communicating results to your stakeholders?
- Are you communicating results to other necessary audiences?