

Partner Feedback Exercise

Learnings from our 2022 Partner Survey and Partner Interviews



A huge THANKS to all the partners who participated in our first CBM Global Partner Survey and the 10 partner organisations who accepted to participate in our first formal CBM Global Partner Interview exercise. Thank you for your willingness and honesty in sharing your thoughts and observations about the quality of CBM Global's work and our partnership with you. Your input is invaluable to us.

CBM Global Disability Inclusion

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Note on document accessibility

To ensure accessibility, all graphs in this document are also described in narrative text or reflected in data tables.

Cover image: A woman using a wheelchair holds a microphone and interviews a man using crutches. Standing behind them are two men and a woman who are looking at the man who speaks. Text says: A huge THANKS to all the partners who participated in our first CBM Global Partner Survey and the 10 partner organisations who accepted to participate in our first formal CBM Global Partner Interview exercise. Thank you for your willingness and honesty in sharing your thoughts and observations about the quality of CBM Global's work and our partnership with you. Your input is invaluable to us.

Introduction

Partnership is at the core of how CBM Global Disability Inclusion (“CBM Global”) works. Embracing Partnership is one of our core organisational values. In our [Approach to Partnership](#) we have defined 6 partnership commitments which ground all that we do: **complementarity of purpose, inclusiveness, responsiveness and flexibility, mutual responsibility and accountability, trust and respect, joint learning**. We strive to adhere to these in all aspects of our work and want to be held accountable to all we work with and who may be affected by our work, most importantly people with disabilities and their communities, and our partners. An open attitude to receiving feedback and complaints is paramount to our ability to improve as an organisation, to facilitate learning, and to break down donor - recipient power dynamics when working with others. We recognise that we can always improve and therefore aim for an environment which encourages partners to give us feedback and to clearly communicate their expectations and hopes.

CBM as an organisation went through significant changes over the past two years, which have resulted in the formation of CBM Global as a new Federation, newly engaging with many partners. We understand these changes may have impacted partners in a variety of ways, and that it is still early days for partners to have a firm view on their partnership with CBM Global. It is important, though, for us to listen to our partners now, to hear what we need to keep doing and where we can improve, but also to establish a baseline to be able to assess our progress over time.

In 2020-2021 we sought feedback through in-depth interviews with organisations of persons with disabilities. This was at a time when we were setting out our commitments towards working in partnership with the disability movement. Earlier this year we published a [‘We have a key role now’](#) report with the findings from these interviews and our improvement commitments.

In May 2022, we widened the feedback scope and invited all organisations with whom we had a formal relationship at that moment and who implement in-country projects with our financial support, to respond to an **online survey**. References to ‘partners’ in this report are to these 88 organisations. The survey was complemented by **focus interviews** with ten randomly selected partners, conducted in June - July 2022. The interviews covered areas which stood out from the survey responses, to help us gain a better understanding of partner expectations, either because survey scores varied a lot, or it wasn’t clear whether a low score implies that we fall short on expectations. We wanted to really understand these issues well, to be able to be very targeted and set the right priorities, in taking relevant actions. The interviews were conducted on an entirely anonymous basis by an external consultancy, Agency RED¹.

This report captures the findings from the survey and the interviews, and our responses to them. A summary report with our commitments from the survey and the interviews is also available: [Partner Feedback Exercise \(2022\) Summary](#).

We have developed a CBM Global internal, detailed action plan, responding to the partner feedback from the Survey and the Interviews, which we have already started implementing.

¹ Agency RED, Rue du Vicaire Savoyard 8, 1203 Geneva, Switzerland (+41 22 346 8189 ; contact@agency-red.com)

We will progressively keep partners informed as we improve our various ways of working. We invite partners to continue to give us their valuable feedback, informally or via our formal feedback channels, which are captured on our website www.cbm-global.org/contact-us.

We plan to conduct a similar feedback exercise every two to three years, allowing us time to work on our commitments, and so that we can track how we improve our ways of working over time, based on partner input.

Our Member, CBM UK, would like to thank the partners who specifically responded to their additional survey questions, posed around access to new partnerships and new funding opportunities gained because of working with CBM UK's support. CBM UK are encouraged by the successes reported and plan to build on these and to continue to provide support in this way. In addition, CBM UK appreciate partners' interest and requests for non-financial support on a wide range of topics, including disability inclusive development, project cycle management, proposal writing, mental health, safeguarding, etc. Alongside CBM Global, CBM UK are currently reviewing the list of topics and considering options for specific targeted engagement as resources permit. Our partners will hear of these initiatives in due course. They are not specifically captured within the scope of this report.

Survey Methodology

The survey was sent to 88 partners in 15 countries across Asia, Africa and Latin America. We received 55 responses, which makes for a 63% response rate.

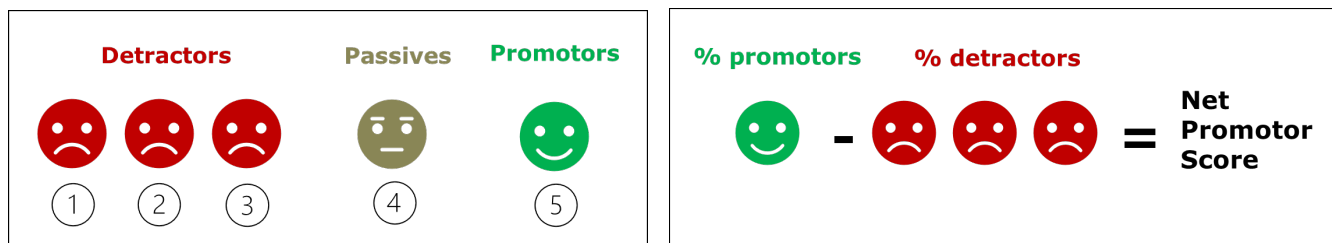
The survey was largely modelled after the work of [Keystone Accountability](#), an independent service provider with a long track record of conducting partnership surveys in the INGO sector. Their survey questions have been tried and tested with over 100 INGOs since 2004. We therefore took their survey questions as a basis, while adding and modifying a few which we felt were specific and important for CBM Global.

For most of the data featured in this report, we used a feedback data analysis technique practiced by Keystone Accountability, called Net Performance Analysis (NPA)². Rather than the standard 10-point rating scale, we used a 5-point scale. This technique distinguishes between three respondent profiles:

1. The '**promoters**', who gave us a rating of 5. These partners are our 'champions', who are generally positive about our partnership relationship and will likely recommend us to others.
2. The '**passives**', who gave us a rating of 4, which is considered average. These partners have no major concerns, they are 'passively satisfied', but they are also rather neutral about partnering with CBM Global
3. The '**detractors**', who gave us a rating of 1-3. These partners have fairly negative perceptions of their engagement with CBM Global.

Under the NPA technique, a 'Net Promotor Score' (NPS) is calculated, being the % of 'promoters' minus the % of 'detractors':

² See www.netpromotersystem.com and [From Engagement to Voice - A Keystone Accountability How-To Guide | Forus \(forus-international.org\)](#)



We opted for Microsoft Forms as an online survey tool, given its excellent accessibility features. Our Country Teams offered local language translations of the survey to partners as needed, for their use alongside the online, English version. Partners were free to respond to the open survey questions in their own language. We requested partners to only submit one single survey for their organisation, in order not to skew results, but at the same time we encouraged them to come together as a team and respond collectively where possible.

A detailed overview of the survey questions and findings, most of which are referenced directly in this report, is available in the [Survey Appendices](#) below.

Interview methodology

Agency RED agreed with CBM Global on the subject areas and a set of questions for the interviews, which they then used flexibly in each specific interview situation, to avoid that partners would feel constrained on how they could answer. For optimal representation, partners to be interviewed were selected based on a sampling exercise, which used these criteria: country, type of organisation, technical area of intervention, length of partnership with CBM, funding CBM Global member. Ten partner organisations, representing a cross-section of these criteria, were invited by Agency RED for the interviews. These partners are assured of anonymity; their names have not been shared and will not be shared with CBM Global. As much as possible, Agency RED conducted the interviews with each organisation over half a day in the form of focus group discussions, with a cross-representation of relevant partner staff. Reasonable accommodation for the interviews, including various language options, was offered as needed.

The list of standard questions and a detailed overview of the recommendations made by Agency RED, most of which are referenced through this report, is available in the [Interview Appendices](#) below.

Agency RED classified their recommendations from the findings as 'Strategic' (S), 'Operational' (O) or 'Tools' (T), and each gave them a dual rating: a 1-3 priority rating in terms of it responding to a major or minor concern from the majority or minority of partners; and a 1-3 rating based on the estimated feasibility in terms of resource needs of implementing the recommendations.

While every effort has been made to accurately reflect the voices of those interviewed as relayed to us by Agency RED, any errors are the responsibility of CBM Global.

Summary findings

Overall response

Overall, we found partners to be positive in their responses and we don't see strong negative effects in partners' feedback from the recent organisational changes at CBM. We are particularly pleased to find that partners rate us highly when asked how we are doing in living up to our partnership commitments.

What partners are positive about

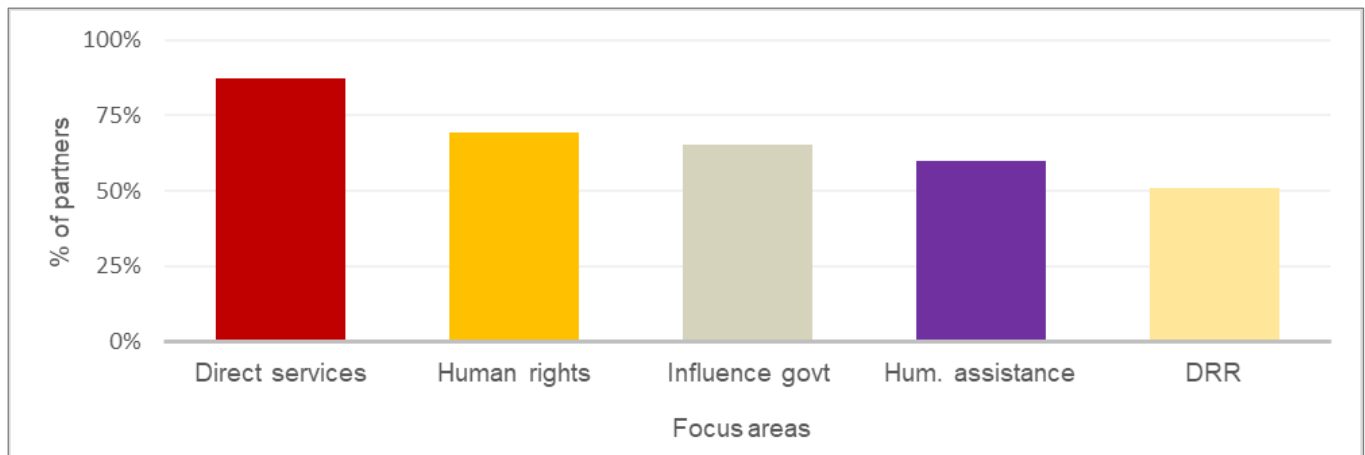
Across responses, a few positive features stand out. Partners generally appreciate the quality of our staff and of our relationship with them. They find us helpful, responsive, and flexible. Partners score us particularly high on the respect we show them. They feel we are willing to learn from our mistakes and expect we will act on their feedback to improve our work. Most partners are comfortable reaching out to us for support. This openness is also felt in the high number of survey respondents who named their organisation (67% of all respondents).

What partners want us to improve or do more of

Partners appeal for more and better non-financial support from us across various areas, including in developing partners' own policies, procedures, and routines. Many partners consider our partner assessment process adequate, others feel we need to simplify our tool, make it more participatory, and provide more support to fill capacity gaps. We can further improve in our communication with partners, particularly about our own organisational identity, our policies, expectations, and requirements. Partners appreciate joint learning opportunities and would like to see more of them. We get varying views from our partners on the issue of equality in the relationship.

Detailed analysis, findings & responses

Who are our partners?



The **main areas of priority and expertise** of our survey respondent partners are direct service delivery (87% / 48 respondents), with 50% (24) of these partners indicating that is in the form of providing clinical services; promotion of human rights (69% / 38), influencing government (65% / 36), humanitarian assistance (60% / 33) and Disaster Risk Reduction (DDR) (51% / 28). Thereagainst, very few partners fund individuals (11% / 6) and less than one quarter conduct research (24% / 13).

Over one third (36% / 20) of the survey respondents identified as Organisations of Persons with Disabilities (OPD), while a quarter (14) of them indicated they manage a hospital. On average we fund 36% of a partner's organisational budget. 18% (10) of partners indicate that only 1-2 organisations (including CBM Global) support their work. The majority (56% / 31) of partners have a longstanding relationship with CBM (more than 5 years). Six organisations whom we have only newly started engaging with, responded to the survey.

For the anonymous focus interviews Agency RED selected 1 partner from each of the following 10 countries: Philippines, Lao PDR, Indonesia, Bangladesh, Nepal, Madagascar, Kenya, Nigeria, Burkina Faso, Bolivia. In their sampling, Agency RED assured a good cross-representation of these 10 partners applying these criteria:

Type of organisation (multiple selection)
Country affiliate of larger INGO
Government agency
Local NGO
National NGO
Organisation of Persons with Disabilities
Organisation that runs health facilities
Other

Funding CBM Global Member
CBM Australia
CBM Ireland
CBM New Zealand
CBM Switzerland
CBM UK

Years of engagement with CBM
0 – 3 years
More than 3 years

Sector of activities
Advocacy
Community based inclusive development
Community mental health
Humanitarian action
Inclusive eye health
Neglected tropical diseases
Other

Why do organisations want to partner with us?



The clear, first reason why partners choose to work with us, is the fact that we provide funding (total score of 232 / average score of 4.22). Others are strengthening organisational capacity and skills (226 / 4.11), and joint learning and understanding (225 / 4.10) in nearly equal numbers; improving strategies of partners (220 / 4.00) and strengthening profiles at national and international levels (206 / 3.75).

Partners are least interested in relying on our influence (195 / 3.55) but do rate our knowledge and influence in the sector quite high, when compared to other NGOs/funders (NPS 24%).

Overall partners wish for more support from CBM Global (NPS -15%), and a large majority is likely to seek continued, future support from us (NPS 75%).

Funding

CBM Global is committed to professionalism, good governance, due diligence, and efficiency in the use of the resources that are entrusted to us by funders. This includes timely and efficient decision making, and deployment of resources.

Funding is the main reason why partners choose to work with us, and interviewed partners specifically expressed they generally satisfied with the financial support they receive from CBM Global. Partners do appeal to us to make more room in the budgets we fund for overhead costs (NPS -25%), practical management tools such as software, hardware, office furniture (NPS -13%); and costs associated with monitoring and reporting (NPS -15%).

This is an area flagged for improvement in the survey and the interviews. "Provide more administrative costs", "provide overhead costs for sustainability" are just some quotes from the narrative survey responses. Views on the efficiency of our funds transfer process (NPS -2%) and the possibility to include costs for reasonable accommodation (NPS -4%) are quite mixed across partners. Similarly, partners have varying opinions about the level of financial support we provide them with, in comparison to other NGOs/funders (NPS 2%).

Interviewed partners additionally ask us to be clear upfront about our financial requirements, e.g., by spelling them out in our Project Contracts. We should not make project budget cuts without prior dialogue with the partner, and without understanding and

agreeing with the partner on the implications those have on the capacity to deliver. A few partners also mentioned they had experienced delays in funds transfers which, particularly in emergency situations, create challenges for partners.

Our response

We have recently established an internal mechanism to allow early release of funds in emergency situations. We will develop a financial guideline document for partners in 2023, to be shared at the start of the project design process. We will explore with our Members whether the level of budget allocation to partners' operational costs can be further increased.

Organisational strengthening

Investing in organisational strengthening and learning from our partners to better achieve systemic and transformative change for people with disabilities and their communities is core to our way of working. We aim to provide quality technical advice to ensure high quality and learning-based programmes, creating an evidence base of good practices and models for replication.

When it comes to their **organisational capacity**, surveyed partners express that we need to improve both in terms of quality and quantity of the support we give them to strengthen their management and leadership skills (NPS -35% quality / NPS -38% quantity). Similarly, they tell us we can do more in our capacity development efforts in partners' own technical area of expertise (NPS -24% quality vs NPS -25% quantity). They are more positive about our support with improving disability inclusion in their programmes and organisation (NPS 13% quality / NPS 2% quantity). We are happy to hear from partners that working with CBM Global has enabled them to increase their overall capacity (NPS 15%) and to become more effective overall as an organisation (NPS 22%).

Non-financial assistance from CBM Global is actually one of the areas which the interviewed partners are particularly satisfied about. They specifically appreciate various capacity strengthening activities offered by CBM Global, whether in organisational or technical areas, and would like to see even more of it. Partners also ask that we make sure our support is fully aligned to partner organisations' needs.

Our response

We ask our Country Teams, and other visiting teams from our CBM Global Federation to consistently build organisational strengthening and exchange opportunities into their engagement with partners, whether during individual or collective partner meetings. The organisational strengthening opportunities shall be based on agreed areas from Partner Assessment action plans and on expressed needs by partners. A CBM Global working group is currently defining our role in and approach to OPD and partner organisational strengthening, whom else we should be working with, which skills this requires of ourselves, and how we can resource this important capacity strengthening work.

Joint learning

Joint learning is one of our six Partnership principles. In our partnerships we seek to mutually strengthen capacity and share learning, as we seek to complement and build each other's expertise and knowledge. We also seek to act as a catalyst for joint learning and networking between partners, facilitating opportunities for exposure and knowledge transfer.

The Agency RED report quotes partner responses on this topic as "priceless" and "wonderful". Partners clearly value and appreciate the **sharing and learning opportunities** we create, whether through annual review meetings, individual partner meetings or joint partner events. Partners ask that we organise even more partner events, particularly at the national level, and that we make sure to invite other organisations to them, such as OPDs that may not have a formal partnership relationship with CBM Global. Partners also would like us to ensure shared learning across all staff levels and technical areas. One area where we need to improve is in the documentation of learnings, for wider sharing and to support replication of good practices or models. We're also asked to consider better use of digital tools to facilitate instant sharing of learnings and experiences.

Our response

Systematic, joint learning needs to be underpinned by a strong knowledge management system. This is an area we need and want to build up. We have just earmarked available resources to invest, in the short term, in strengthening our Monitoring, Evaluation, Accountability and Learning (MEAL) framework and our expertise in this important area. This includes building a strong knowledge management system that is informed by learnings from and with partners. We expect to be able to share more on this with partners in 2023.

Networking

Given the networks and contacts we have built in our programme countries and globally, we are well positioned to connect OPDs and other partner organisations, government bodies and relevant national and local networks to undertake joint advocacy or programme work, to take advantage of synergies, facilitating shared learning and expanding influence.

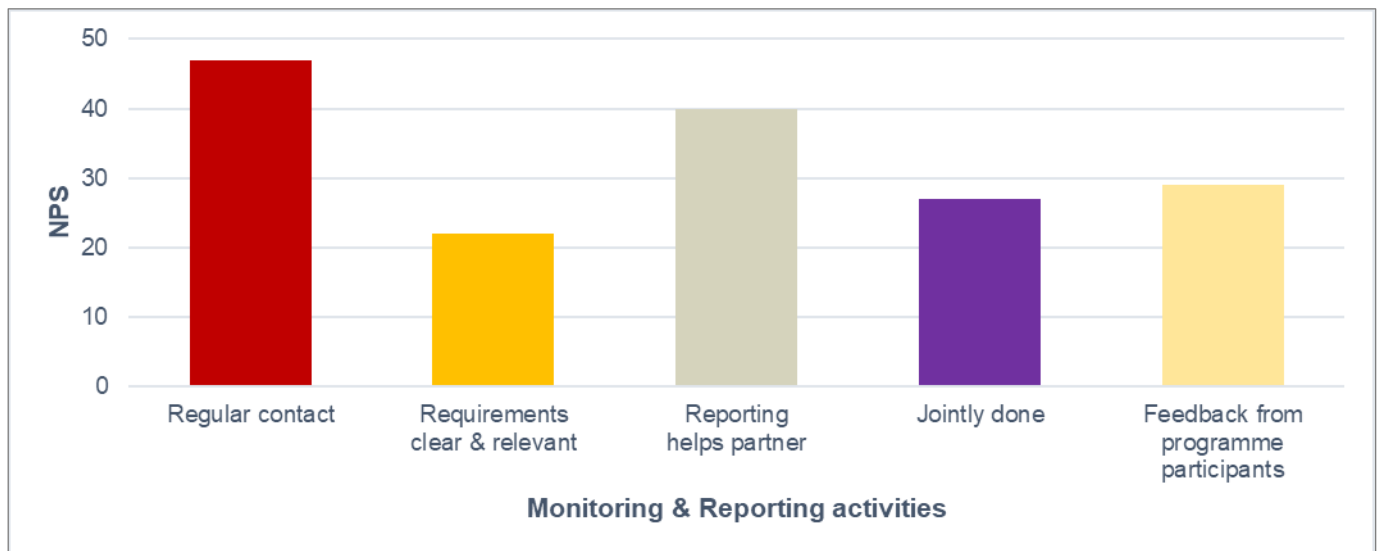
Our partners expect to a lesser extent that we **link them with other organisations** (total score 200 / average score 3.64), and don't feel we are particularly strong in this (NPS -31% quality / NPS -33% quantity). Yet many state that working with CBM Global has enabled them to become better networked with other organisations (NPS 4%).

Conversely, the interviewed partners mention that we do well at facilitating collaborative relationships between our partners in each country. They would like us to do this even more, not only in country, but also by connecting our partners to relevant counterparts at the regional and international level. This creates opportunities for sharing experiences and learning, and for maximising impact by working together. Partners also asked that we help them increase their visibility and promote them to other organisations, including potential funders, both nationally and internationally. Partners further call for more CBM Global support to influence national actors at the policy level.

Our response

We have recently started to systematically capture and document the key external collaborative relationships being pursued across the CBM Global Federation where cross-Federation coordination is required. This helps us to ensure a coordinated approach to managing these relationships, and it highlights opportunities for making connections across local, national, regional, and international level. Several of our Country Teams are currently developing the CBM Global strategy for their country, in close dialogue with programme partners and OPDs, and this includes defining how and where we best engage with or support them in their advocacy work. We are also testing ways to establish integrated programmes, bringing together several partner organisations under the umbrella of a single programme, seeking to make sure that the output and outcomes of the programme are larger than the sum of the individual partner projects. Depending on pilot learnings, these are models we envisage replicating.

Monitoring, reporting and evaluation



We have defined a set of monitoring and evaluation requirements for all partner projects, allowing some flexibility to tailor the exact needs to the specificities of each project.

Surveyed and interviewed partners appear generally satisfied with our monitoring and reporting activities although they would like to receive more funding and support for them (NPS -15%). Partners are particularly positive about the **regular contact with CBM Global to discuss progress** (NPS 47%) and feel that the financial and narrative **reporting routines** we have in place also **help partners** to review and evaluate their work (NPS 40%). They find that our **narrative and financial reporting requirements** are clear and relevant (NPS 22%), albeit that templates are felt to be long and detailed. Interestingly, when it comes to regularly soliciting partners for feedback from programme participants, which is an area we want to strengthen, our partners already score us positively (NPS 11%). In general, compared to other NGOs/funders, we are felt to be efficient in our monitoring and reporting (NPS 22%).

While pleased with these positive perceptions from partners, we also acknowledge the suggestions made in response to the question what we should improve, where several partners call for fewer and simpler reporting requirements, as these sometimes take away

valuable time from project implementation. Simplification is one of our ambitions, and we appreciate when partners point out to us where we can do better in this.

Following are some quotes from the surveyed partners:

“have fewer [reporting] templates and clear reporting timelines”

“CBM could reduce some reporting requirements...”

“simplifying the reporting templates and making the reports semi-annual”

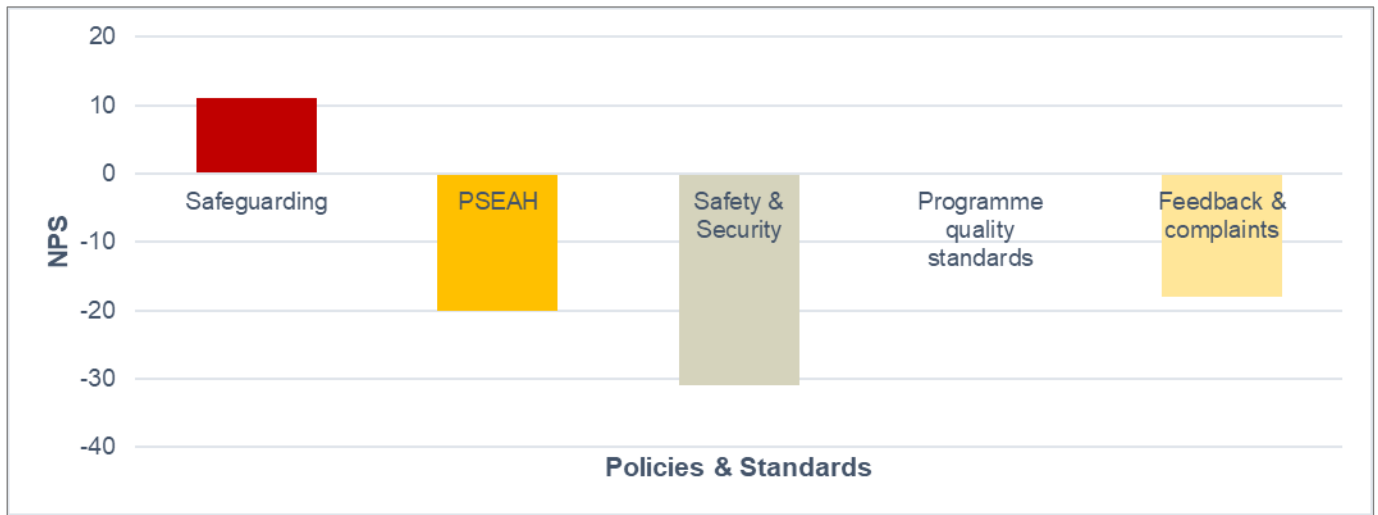
One further recommendation made by the interviewed partners is to define clear and simple to measure indicators that reflect partner capacity and allow easy progress tracking. This could be facilitated by strong baseline studies prior to starting a project. Another recommendation is that we provide more clarity and training as needed on exact reporting requirements and how to use our reporting templates, and to provide them in a timelier manner. Our CBM Global Teams should routinely build relevant sessions into partner meetings and monitoring visits. Partners also ask for more support from CBM Global, both in terms of capacity and resources, to establish their own monitoring routines and to build cross-sectoral aspects such as gender and disability inclusion into these routines. Partners appeal for more harmonisation of reporting requirements across funders. Other, report-specific suggestions were also made.

Our response

In 2023, after a first full calendar year of our operations, we will critically look at our reporting requirements and templates, based on feedback and learnings from partners and our own teams; this with a view to further streamline and where possible, simplify. In the meantime, we work with our Country Teams to ensure partners receive clear, timely guidance on current reporting requirements and templates. This year still we aim to conclude work on formulating our impact framework, including a set of standard indicators for all projects. Its roll-out to and training for our teams and partners is planned for 2023.

Policies & Standards

We asked partners to what extent they feel we engaged with them on our key policies and standards in the last year. Here the picture is mixed, but we have work to do. Whereas partners tell us we have sufficiently engaged with them around **Safeguarding** of Children and Adults at Risk (NPS 11%), they also express that we haven't sufficiently done so around its immediately related area, **Prevention from Sexual Exploitation, Abuse and Harassment** (PSEAH) (NPS -20%). Historically the latter area was embedded in the CBM policy on Safeguarding. In 2021 we developed a dedicated CBM Global policy to PSEAH, to give this critical area more prevalence. We need to do more work with our partners to ensure they have their own policy and procedures in place. The same is true for the area of **Staff Safety and Security** (NPS -31%). We have a joint duty of care, to ensure our respective staff, programme participants and others we work with are safe from harm.



Partners' views on the extent of our engagement with them around **Programme Quality Standards** differ greatly (NPS 0%). We have our CBM Global Programme Quality Framework, which sets out the high-level principles and commitments that we expect to guide programme quality and to which we seek to be held accountable, as well as a set of related tools and guidelines. We need to invest more in embedding these in project design, monitoring, evaluation, learning, and accountability done jointly with our partners; and need to incorporate them in our partnership process and partner capacity development plans.

Our response

We ask our Country Teams to actively share CBM Global's Safety & Security policy and related procedures with our partners, particularly in more insecure environments, as a resource that may assist them when developing their own safety and security related policy and procedures. We are training our Country Teams to ensure they can provide skilled support to partners in the development and implementation of their own Safeguarding and PSEAH policies and reporting mechanisms. Enhancing programme quality, in line with our **Programme Quality Framework**, is a shared endeavour with our partners. We ask our Country Teams to actively build awareness of our Programme Quality Framework with our partners and to explore with them opportunities to enhance the quality of our projects and programmes, in line with it. We also ask our partners to provide us feedback on how well we are meeting the commitments articulated in the Framework. We continue to embed our programme quality standards into procedures and tools.

Feedback & Complaints

The partner survey and interview exercise are an expression of our Partnership commitment to responsibility and accountability, and to joint learning. In addition, we welcome informal feedback from partners on an ongoing basis, and have various formal feedback mechanisms in place, for partners and the public at large, via our website [Contact Us | CBM Global \(cbm-global.org\)](https://www.cbm-global.org). This is in line with various CBM Global policies, some of which are mentioned above: [Programme Feedback and Complaints](#), [Safeguarding of Children and Adults-at-Risk](#), [Protection from Sexual Exploitation, Abuse and Harassment](#), and [Whistleblowing](#). We have well defined internal processes, responsibilities, and communication channels in place, to handle various types of feedback or complaints we may receive.

Generally, the surveyed and interviewed partners feel safe to give feedback to CBM Global, and they are comfortable about the fact that we value and use their feedback to improve our ways of working. They would like to have more opportunity to give feedback to the wider CBM Global teams, beyond the Country Teams they regularly interact with, e.g., via an annual partner meeting or event, where other CBM Global teams would participate. Partners feel that such a getting together could really help to solve problems or discuss improvements, without having to revert to more formal complaints routes.

When it comes to our **Programme Feedback & Complaints** mechanisms (NPS -18%), we have work to do. While we have the policy, procedures, and mechanisms in place for partners, programme participants and others to turn to us with any concerns they may have, we must increase awareness of these with partners (NPS -7%). We also need to collaborate with partners to make sure they reach programme participants. It is further important that we continue to ask partners to share programme participant feedback with us (NPS -11%), as it informs what we and they do well and where we jointly need to improve to have most impact with our work.

Our response

In a first instance, we want to make sure that our partners are familiar with our formal feedback mechanisms, e.g., by including them in a partner orientation pack and/or by asking our Country Teams to set aside time in regular partner meetings to introduce them. As a next step, in 2023, we plan to work out how we can best support partners to build their own feedback mechanisms for programme participants and their communities, where these don't currently exist. We also encourage our Country Teams to include other, relevant CBM Global colleagues in the meetings they have with partners, and to specifically dedicate time in the meeting agendas to solicit feedback from partners about our partnership relationship with them.

Partner assessment

Prior to engaging in project/programme work with an organisation, CBM Global will conduct a so called Partner Assessment, with the aim to evaluate shared values and interests; to assess the organisation's organisational capacity to manage the envisaged project/programme work; and to identify areas that require progressive strengthening. A capacity development action plan will typically be agreed. Annual reviews of this action plan are envisaged, and a similar Partner Assessment exercise is conducted every 3 years with existing partner relationships, primarily to track progress with action plan implementation and to assess any relevant changes in the organisation.

Surveyed partners' views on our **partner assessment process** vary quite a lot (NPS 4%). This is best illustrated with some of the narrative comments we received:

<p>“We are satisfied with the current process”</p> <p>“There was a lot of new learning”</p> <p>“Keep up the existing standard”</p> <p>“The process is adequately thorough”</p>	<p>versus</p>	<p>To have more inclusion in the [...] process</p> <p>“The form should be shorter”</p> <p>“Involvement of OPDs”</p> <p>“To give support to improve gaps identified”</p> <p>“Make it more partner-led and needs based”</p>
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The interviewed partners find that the Partner Assessment process is overall beneficial to them as an organisation, as it allows them to take a critical look at their own organisational strengths and weaknesses. On the other hand the process is found to be lengthy and somewhat complex (e.g., use of technical terminology), and not sufficiently tailored to different types of organisations (e.g., OPDs), or sufficiently accommodating unique organisational circumstances. Partners call for better, joint preparation to have clarity on expectations, for more communication during and following the assessment, and in particular for a closer dialogue and mutual sign-off of the action plan. Several partners expressed the wish to bring more mutuality in the process, to also allow the partner organisation to get to know CBM Global as an organisation.

Our response
 We review our partner assessment tool in the 2nd half of 2022, and will draw on this valuable partner input (e.g., length of the process, adaption to organisations’ specifics, improved communication, etc.). As part of this already ongoing review, we will explore how to best bring the aspect of mutuality into the process, and we envisage testing the updated tool with a few organisations to ensure its adequacy, before formally introducing it in 2023.

Contractual terms

When funding a project or programme to a partner, CBM Global requires that a legally binding Project Contract is put in place between the Partner organisation, CBM Global and the funding Member(s) of CBM Global.

The scores we get from partners on our **contracting process** is an NPS of 9%.

The interviewed partners expressed they are overall satisfied with the terms of the Project Contracts, but they also suggested some points for improvement. We need to allow more time for partners to read, understand, ask questions about the Project Contract template, and where appropriate, allow adaptation of the standard contract conditions. We currently present Contracts to partners only just before the start of project activities, and on occasion even after those have started, leaving no time for dialogue. Partners also wish for certain requirements, e.g., on data collection, budget flexibility, to be included in the Contract, to ensure expectations on partners are clear.

Our response

We are exploring the best way to make sure that Project Contracts are shared with partners earlier in the project design process, e.g., as part of a CBM Global info pack. In 2023 we will review our Contract templates and determine how best to reflect in them the aspects which partners feel are currently missing (data collection, budget issues, etc.). We are reinforcing with our Project Development Teams the importance of planning sufficient contracting time into the project design process, to avoid delays.

Exit and transition strategy

Our own internal project approval criteria state that each project design should demonstrate a clear sustainability plan, which details how the project's results will extend beyond the implementation period. We also want to make sure that plans for project exit, transition and/or long-term planning are clearly discussed with partners upfront.

Surveyed partners give us a positive score of NPS 20% when asked whether CBM Global has explained the envisaged duration of the partnership. Conversely, the interviewed partners tell us that we currently do not systematically discuss exit, transition, and sustainability strategies upfront, at the start of developing a project with them. They also ask for more systematic follow-up on project results and their sustainability during the implementation of the project.

Our response

We will build the discussion on project sustainability, transition and exit into our internal project design tools and system, to help our teams to be disciplined about including this important aspect in the start of each project design process with partners.

Impact of the transition

Referring to the significant organisational changes CBM went through in the last few years, as mentioned earlier in this document, we were keen to learn how partners have experienced this transition process and all the changes for them, that came with it.

The interviewed partners appreciate having fewer regular contact points with CBM compared to the past, and they mention easier communication. Partners would like to gain a better understanding of what CBM Global stands for, of the direction we are taking, and how we can involve them in it. Some partners expressed concern about the fact that we are a dual mandate organisation, worried that our engagement in the humanitarian field will distract resources from our regular development work. Partners would have liked to receive more guidance on any changes in the first few months after the transition of the partner relationship (e.g., reporting requirements), and more clarity on responsibilities and communication lines across the different CBM Global teams.

Our response

We will revise the partner orientation pack, which was shared with all partners who transitioned to CBM Global in 2021 – 2022, and which we want to make available to all future partners. Particularly, we will include a clear overview of roles and responsibilities of the different CBM Global teams, and communication lines.

Relationship, communication, cultural sensitivity and understanding

Active listening, open and timely communication that is respectful and sensitive to culture and context, are key for us at CBM Global as we want to live out our partnership commitments. This includes making sure that our information and communication are accessible.

Partners generally rate our staff highly. They find them **respectful, helpful, and capable** (NPS 53%). We show partners a high level of respect compared to other NGOs/funders (NPS 33%). 'Friendliness', 'supportive', 'participatory approach', 'flexible', frequent engagement', 'available', 'responsive', 'trust', 'great collaboration', 'integrity'. These are all words that come through in the appreciation that partners express for CBM Global. Particularly our in-country staff are commended by partners.



In this context, surveyed partners feel they have a good **understanding** of CBM Global's **vision and values** (NPS 25%), that CBM Global understand theirs (NPS 53%); knows and supports their priorities (NPS 20%); and understands the partner's environment and cultural context (NPS 7%).

Partners are very confident that we will use the feedback from this survey to improve our work (NPS 65%). They see that we learn from our mistakes (NPS 9%) and that we listen and respond to their questions and concerns (NPS 13%).

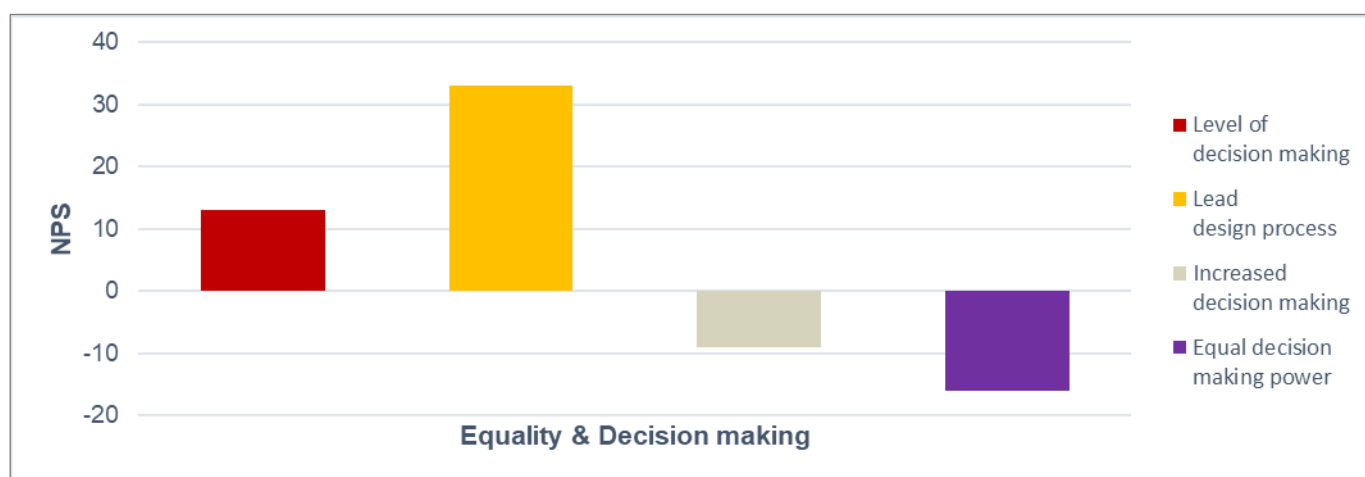
Communication is an area where also most of the interviewed partners are very satisfied. Similarly, they find that particularly our Country Teams are available, supportive, and responsive. On the other hand, a few partners' experience is not that positive. They feel our communication is top-down ("donor-recipient"), and our demands can be heavy and come with short notice. Communication lines are not always clear, and information flows not always efficient, both internally between CBM Global offices, and with the partners. Partners ask that we are more considerate in considering time differences, language challenges, and other realities on the ground.

Our response

We explore how to best ensure partners have clarity about roles and responsibilities of the different CBM Global Teams they may interact with, and about appropriate and efficient communication lines. With our teams, we will organise an internal dialogue around, and will continuously reinforce the importance of, respectful and timely communication. We will call for reason in ad hoc demands on partners. We urge partners to give us informal, but also use our formal avenues for feedback, to point out or elevate situations where they feel that our interaction with them is not appropriate and not in line with our partnership principles, so we can address these occurrences in a targeted manner.

Equality, decision making and trust

In line with our partnership principles, and our Programme Quality Framework, CBM Global aims to promote shared ownership and responsibility, and participation of persons with disabilities via OPDs across our work, with a particular emphasis on project design, evaluation, and learning. We also seek to transform the traditional 'donor-recipient' relationship into a partnership relationship of equality and mutuality.



We inserted several questions across the survey to find out from our partners whether they experience a sufficient level of equality and decision making in our partnership with them. Whereas partners tell us that they are happy specifically with the way in which we encourage them to lead the project design process (NPS 33%), views are somewhat contradictory when it comes to decision making. When asked about a sufficient level of decision making, the responses are mostly positive (NPS 13%). Thereagainst, when asked about equal decision-making power, the answer is mostly negative (NPS -16). More generally, partners do feel we haven't done enough yet to increase their decision-making role and authority in the relationship (NPS -9%).

Following are some partner quotes from the survey on the latter point:

“feeling of ownership”
“participatory approach in dealing with partners”
“equal partnership”

versus

“it should not be felt by partners that decisions are being imposed as CBM Global is providing the funds”
“... trust in the partner during the project design process”

On this topic there is an overall feeling also with the interviewed partners that we take well into account the needs and priorities of partners, but we can further improve in how we work. Partners appeal to us to involve them more actively and consistently in the project design phase, and not make changes or impose decisions, without proper dialogue. This will result in a better sense of ownership, responsibility, and accountability of partners over the projects. We should strive to better understand partner organisations, their needs, including training needs, their capacities, and priorities. Partners ask us to put more confidence in their skills and knowledge of the local context, and to better take those into account.

Our response

We are reinforcing with our Country, Member and Technical teams the importance of co-designing projects with partners. We plan various activities to build understanding of our Partnership Principles across our teams and of the behaviours and ways of working required to live them out, to ensure our partnership principles are engrained in our work and all our interaction with partners. We have recently established a Localisation Steering Group, with several partner representatives, as an advisory board to keep CBM Global accountable to our commitment to place partnership at the core of our work and to guide us towards more locally led development.

Other

We included in the survey statements around the areas of our support to partners in improving mental health and wellbeing in their programmes and organisations (NPS -69 % quantity / NPS -67% quality); and similarly, our support to partners with considering the consequences of climate change on people with disabilities in their programmes (NPS -67% quantity / NPS -71% quality). Not entirely surprisingly the scores are poor. On the issue of **mental health and wellbeing**, while we have the technical expertise and funding available to support partners on this in their project work, we have not focused on these issues in the partner organisations themselves. COVID-19 has only highlighted the importance and the challenges around the mental health and wellbeing of staff, and internally we are exploring ways to best ensure this for our colleagues. On the topic of **climate change** and its effect on people with disabilities, we recently had the opportunity to draw attention to the matter at the COP26 conference in Glasgow.

Our response

We have constituted an internal working group that formulates a climate change adaptation strategy for CBM Global, which will define our position and where we can add most value in this very large field of work. We will further explore partner expectations on us around mental health and wellbeing, and climate change, via regular informal and formal partner interaction.

Closing remarks

Partnership is at the heart of how CBM Global works. We believe working with and enabling partner organisations is central to developing appropriate, high quality and sustainable programmes, advocacy engagement and external advisory work. We believe that our vision of an inclusive world in which all people with disabilities enjoy their human rights and achieve their full potential can best be achieved through working in partnership, to jointly break the cycle of poverty and disability.

Through the survey and through the interviews via Agency RED, we have listened to our partners, to hear what we need to continue doing well, and where we need to improve and what we should do more of, whether that be in the quality and quantity of our financial and non-financial support across various areas, our partner assessment process, our communication, the area of joint learning, etc.; or in better balancing the power and decision making for our partners in the relationship. We want to be accountable for our actions and for the ways we engage with our partners. With this feedback we can and will improve our ways of working, the quality of our interaction with partners, our understanding of their challenges and issues, and ultimately, increase the value of our partnerships.



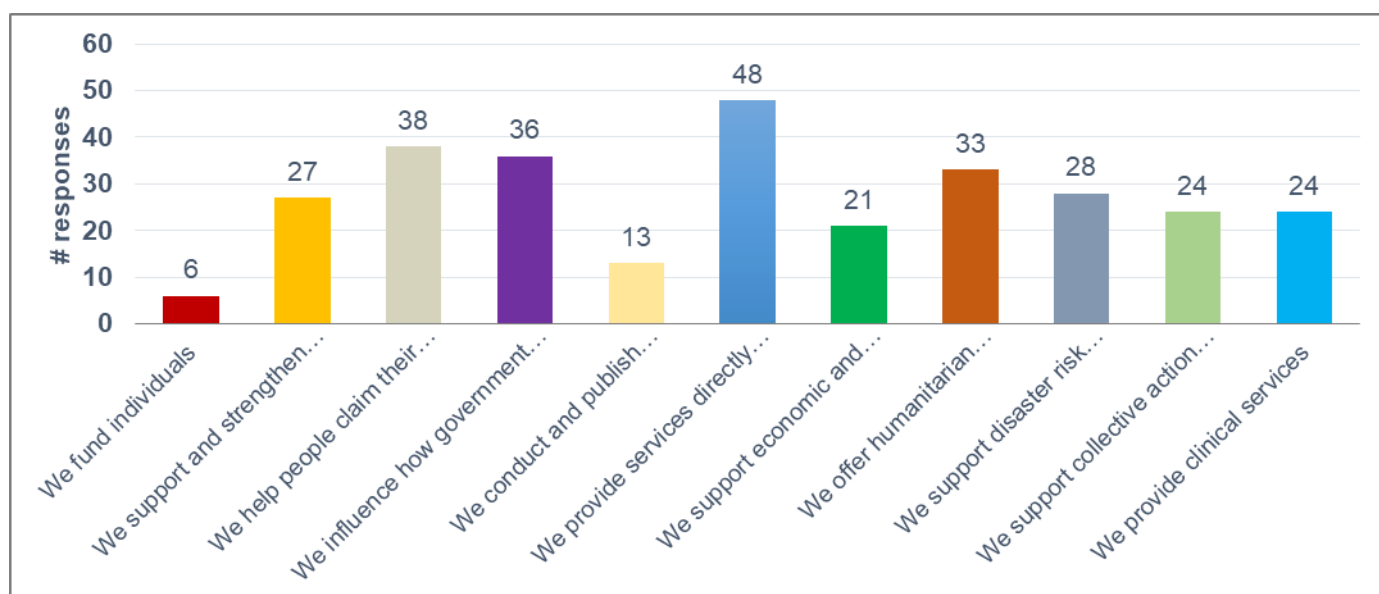
We are very pleased to learn that our partners rate us well already on how we are living up to our **CBM Global partnership commitments** (Complementarity of Purpose / NPS 15%; Inclusiveness / NPS 44%; Responsiveness & Flexibility / NPS 22%; Mutual Respect and Accountability / NPS 38%; Trust & Respect / NPS 49%; Joint Learning / NPS 35%). Yet we can and will strive to further deepen our partnerships in the future, foster an ongoing, open relationship with partners and encourage partners to continue giving us feedback.

Survey Appendices

Response rate

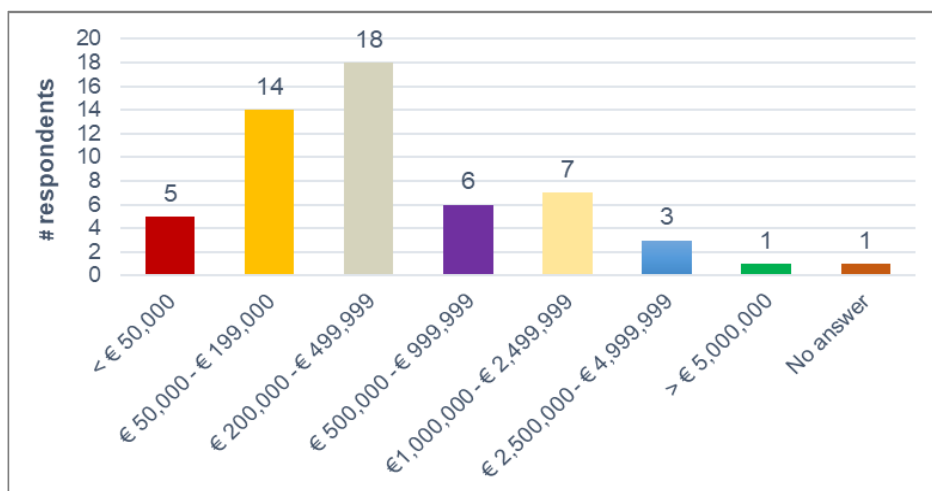
Description	Number
Number of partners invited to respond	88
Number of responses received	55
- Of which organisations of persons with disabilities	20 (36%)
- Of which organisations that manage a hospital	14 (25%)
Response rate	63%

Partners' priorities & expertise (multiple options could be selected)



Organisation's priorities & areas of expertise	# of responses
We fund individuals	6
We support and strengthen civil society organisations	27
We help people claim their human rights	38
We influence how government and other powerful organisations work	36
We conduct and publish research	13
We provide services directly to poor people and communities	48
We support economic and productive enterprises that benefit poor people	21
We offer humanitarian assistance	33
We support disaster risk reduction	28
We support collective action by our members	24
We provide clinical services	24

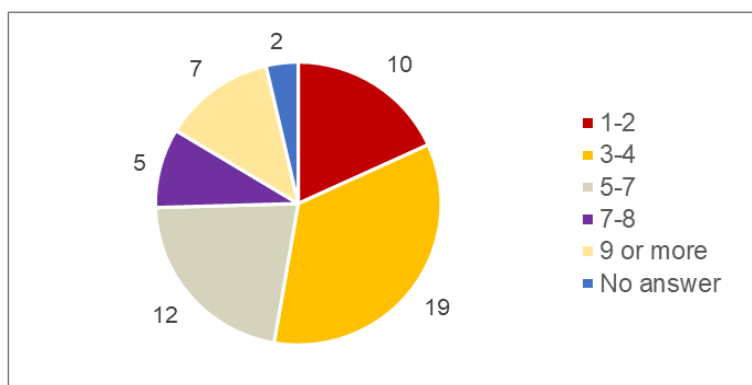
Partners' annual organisational budget and budget support



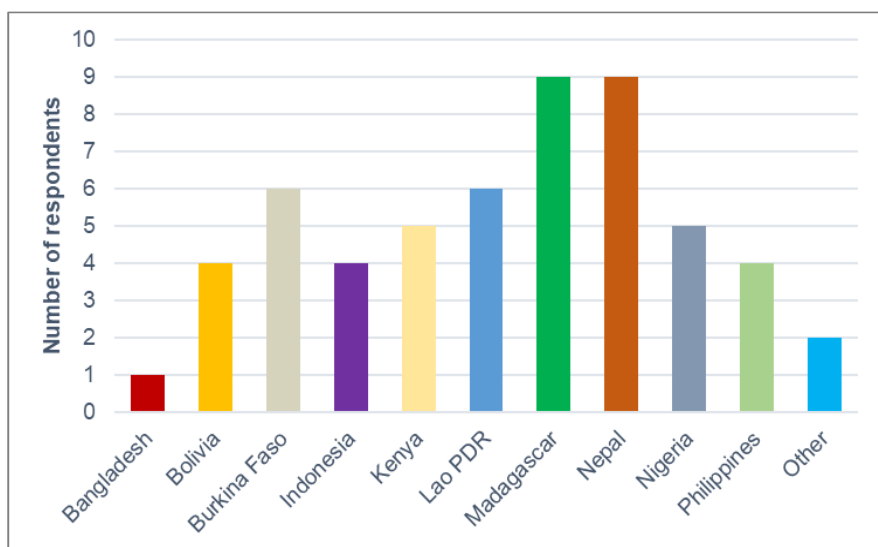
Average approximate % of partner budget funded by CBM Global	36%
Number of partners whose budget is 100% funded by CBM Global	4

Annual organisational budget (EUR equivalent)	# of respondents
< € 50,000	5
€ 50,000 - € 199,000	14
€ 200,000 - € 499,999	18
€ 500,000 - € 999,999	6
€1,000,000 - € 2,499,999	7
€ 2,500,000 - € 4,999,999	3
> € 5,000,000	1
No answer	1

# of organisations supporting the partner	# of respondents
1-2	10
3-4	19
5-7	12
7-8	5
9 or more	7
No answer	2

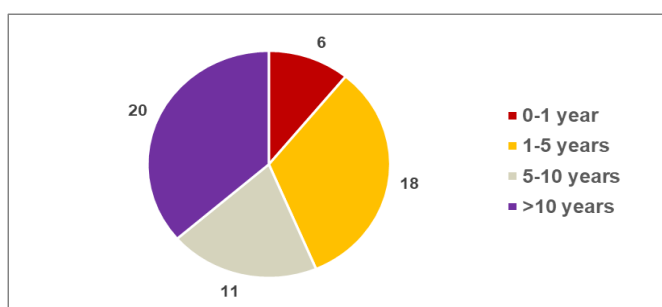


Partners' locations



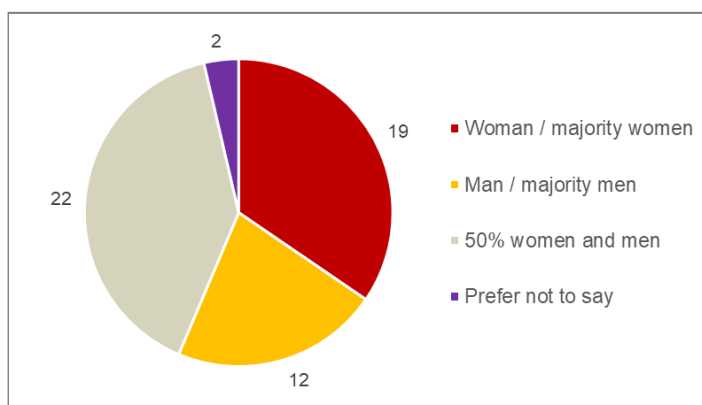
Country	# of respondents
Bangladesh	1
Bolivia	4
Burkina Faso	6
Indonesia	4
Kenya	5
Lao PDR	6
Madagascar	9
Nepal	9
Nigeria	5
Philippines	4
Other	2

Length of partnership with CBM



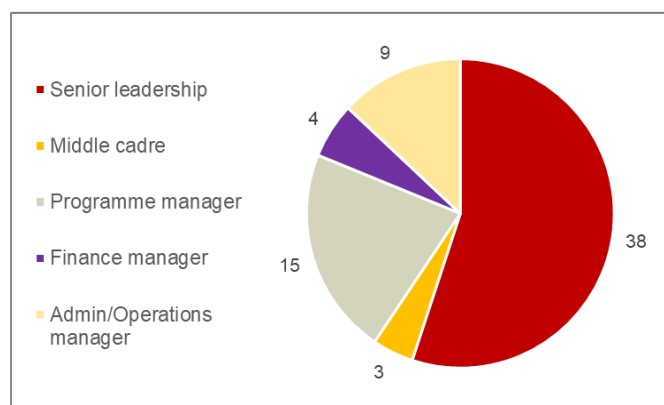
Years of partnership with CBM	# of respondents
0-1 year	6
1-5 years	18
5-10 years	11
>10 years	20

The Respondents



Gender	# of respondents
Woman/majority women	19
Man/majority men	12
50% women and men	22
Prefer not to say	2

13 respondents (24%) identify as a person with a disability



Level / area of responsibility	# of respondents
Senior leadership	38
Middle cadre	3
Programme manager	15
Finance manager	4
Admin/Operations manager	9

Partnership Aims

What are the main reasons you choose to work with CBM Global?	1-3 Detractors	4 Passives	5 Promoters	NPS
Improve our strategies	25%	39%	36%	11%
Joint learning and understanding	27%	29%	44%	16%
Strengthen our presence at national and international levels	42%	29%	29%	-13%
Link with other organisations	42%	40%	18%	-24%
Influence	48%	34%	18%	-31%
Strengthen our skills and organisational capacity	25%	30%	45%	20%
To fund our work	16%	33%	51%	35%

	1-3 Detractors	4 Passives	5 Promoters	NPS
Do you get a sufficient degree of support from CBM Global to better achieve your goals?	39%	37%	24%	-15%

Monitoring & reporting

How useful do you find CBM Global's activities to monitor your work & achievements	1-3 Detractors	4 Passives	5 Promoters	NPS
We are in regular contact with CBM Global to discuss progress	15%	23%	62%	47%
Narrative and financial reporting requirements are clear and relevant to our work	20%	38%	42%	22%
Narrative and financial reporting routines also help us in reviewing and evaluating our work	13%	34%	53%	40%
Monitoring of our work is done hand-in-hand with us	22%	29%	49%	27%
CBM Global monitors our work independently from us	49%	22%	29%	-20%
CBM Global is flexible in allowing us to make changes to our activities and budgets based on lessons learned	33%	27%	40%	7%
CBM Global regularly asks for us to share the feedback we receive from our programme participant groups or beneficiaries	27%	35%	38%	11%

Please rate the below statements with how much you agree or disagree	1-3 Detractors	4 Passives	5 Promoters	NPS
We work with CBM Global to identify useful and relevant ways of monitoring our impact	25%	44%	31%	5%
CBM Global provides enough funds and support for us to monitor and report on our work	45%	24%	31%	-15%
Existing project level indicators are relevant to our work	15%	41%	44%	29%

Non-financial support

Please rate the quantity (volume) of non-financial support you may have received from CBM Global	1-3 Detractors	4 Passives	5 Promoters	NPS
Achieve shared programme goals	33%	38%	29%	-4%
Strengthening our management and leadership skills	53%	29%	18%	-35%
Introductions to other organisations or people or networks	51%	29%	20%	-31%
Capacity development in our own specialty (technical) area of work	40%	34%	16%	-24%
Support with improving disability inclusion in our programmes and organisation	29%	29%	42%	13%
Support and understanding towards improving mental health and wellbeing in our programmes and organisation	73%	23%	4%	-69%
Support with considering the consequences of climate change on people with disabilities in our programmes	76%	15%	9%	-67%

Please rate the quality of non-financial support you may have received from CBM Global	1-3 Detractors	4 Passives	5 Promoters	NPS
Achieve shared programme goals	42%	31%	27%	-15%
Strengthening our management and leadership skills	56%	36%	18%	-38%
Introductions to other organisations or people or networks	51%	31%	18%	-33%
Capacity development in our own specialty (technical) area of work	47%	21%	22%	-25%
Support with improving disability inclusion in our programmes and organisation	27%	44%	29%	2%

Please rate the quality of non-financial support you may have received from CBM Global	1-3 Detractors	4 Passives	5 Promoters	NPS
Support and understanding towards improving mental health and wellbeing in our programmes and organisation	75%	18%	7%	-67%
Support with considering the consequences of climate change on people with disabilities in our programmes	78%	15%	7%	-71%

To what extent do you agree with the following statements?	1-3 Detractors	4 Passives	5 Promoters	NPS
CBM Global is flexible and willing to adapt the terms of its support to meet our needs	35%	34%	31%	-4%
CBM Global's contracting process is clear and efficient	27%	37%	36%	9%
Operational processes (e.g reporting, visit preparations and follow-up, funds call-up, etc.) are generally simple and clear	29%	40%	31%	2%
CBM Global's partnership assessment process is fair and transparent, and funding and support is provided to address any gaps in capacity identified in the assessment	27%	42%	31%	4%

Financial support

How much do you agree or disagree with the following statements about how CBM Global works?	1-3 Detractors	4 Passives	5 Promoters	NPS
Funds transfer requests are handled efficiently and timely, and funds are transferred swiftly	29%	44%	27%	-2%
We can include overhead costs in our project budgets	49%	27%	24%	-25%
We can include requests for software, hardware, office furniture costs in our budgets to aid programme management	42%	29%	29%	-13%
We can include requests for reasonable accommodation, assistive devices, etc. in our budgets	36%	31%	33%	-4%

Respect and understanding

How much do you agree or disagree with the following statements about how CBM Global works?	1-3 Detractors	4 Passives	5 Promoters	NPS
CBM Global understands our working environment and cultural context	24%	45%	31%	7%
CBM Global promotes our organisation in the media, to donors and elsewhere	56%	26%	18%	-38%
CBM Global has explained the envisaged duration of our partnership	22%	36%	42%	20%
We are familiar with and understand CBM Global's vision, mission, plans and strategies	16%	42%	42%	25%
We are familiar with CBM Global's complaints procedure which we could use if we needed to	35%	38%	27%	-7%
CBM Global respects our vision and values	7%	33%	60%	53%
CBM Global understands our own priorities and supports us to progress them	22%	36%	42%	20%
We expect that CBM Global will use the feedback from this survey to improve its work	5%	24%	71%	65%
We are comfortable with the level of decision making we have in our relationship with CBM Global	27%	33%	40%	13%
CBM Global encourages us to lead the design process for new projects	13%	42%	45%	33%

Relationship and communication

To what extent do you agree with the following statements?	1-3 Detractors	4 Passives	5 Promoters	NPS
CBM Global listens and responds appropriately to our questions and concerns	24%	40%	36%	13%
CBM Global staff ask for our advice and guidance	31%	33%	36%	5%
CBM Global staff are respectful, helpful and capable	15%	27%	58%	44%
CBM Global learns from its mistakes and makes improvements to how it works	27%	37%	36%	9%

To what extent do you agree with the following statements?	1-3 Detractors	4 Passives	5 Promoters	NPS
CBM Global communicates clearly and timely about any changes in its processes or requirements	22%	45%	33%	11%
CBM Global provides us with resources like photographs, videos and stories written about our work and gives us consent to share	38%	28%	24%	-15%
We feel comfortable reaching out to our CBM Global contacts when we need support	22%	25%	53%	31%

Policies and standards

In the last year, to what extent has CBM Global engaged with you on the following policies and standards?	1-3 Detractors	4 Passives	5 Promoters	NPS
Safeguarding of Children and Adults at Risk policy	29%	31%	40%	11%
Prevention of Sexual Exploitation, Abuse and Harassment policy	44%	32%	24%	-20%
Staff Safety and Security management	51%	29%	20%	-31%
Programme Quality Standards	33%	34%	33%	0%
Programme feedback and complaints, including from programme participants / beneficiaries	44%	31%	25%	-18%

Approach to Partnership

How well do you consider CBM Global is doing in living up to its following Partnership commitments?	1-3 Detractors	4 Passives	5 Promoters	NPS
Complementarity of purpose	20%		35%	15%
Inclusiveness	13%	31%	56%	44%
Responsiveness & flexibility	22%	34%	44%	22%
Mutual respect and accountability	15%	32%	53%	38%
Trust and respect	13%	25%	62%	49%
Joint learning	13%	40%	47%	35%

Please rate the following overall statements:	1-3 Detractors	4 Passives	5 Promoters	NPS
Our decision making role and authority has increased in our relationship with CBM Global	36%	37%	27%	-9%

Please rate the following overall statements:	1-3 Detractors	4 Passives	5 Promoters	NPS
We experience an equal decision-making power in our relationship with CBM Global	42%	33%	25%	-16%
Working with CBM Global has enabled our organisation to increase our overall capacity	24%	38%	38%	15%
Working with CBM Global has enabled our organisation to become better networked with other organisations	25%	46%	29%	4%
Working with CBM Global has enabled our organisation to become more effective overall	24%	31%	45%	22%
We are likely to seek continued, future support from CBM Global	4%	18%	78%	75%

Comparison to other NGOs

How does your experience with CBM Global compare to your experience with other NGOs/funders?	1-3 Detractors	4 Passives	5 Promoters	NPS
Quantity and type of funding from CBM Global	33%	32%	35%	2%
Non-financial support from CBM Global	36%	37%	27%	-9%
Respect CBM Global shows us	22%	23%	55%	33%
Efficiency in monitoring and reporting	18%	42%	40%	22%
Knowledge and influence in the sector	20%	36%	44%	24%
Simplicity & clarity of processes	27%	37%	36%	9%

Interview Appendices

Guiding interview questions per topic

Topics	Questions	Interviewees
Partner assessment process	<ul style="list-style-type: none"> What do you think of the partner assessment process? What difficulties have been encountered and what can be improved? 	Partners' directors, Project managers, HR directors, Finance directors
Contractual terms	<ul style="list-style-type: none"> What do you think of the terms of your contract with CBM? Is the information clear and detailed enough? What can be improved? 	Partners' directors, Project managers, HR directors, Finance directors
Communication and Cultural sensitivity	<ul style="list-style-type: none"> What do you think of the communication between CBM Global and your organisation? Are you receiving the information you need at the right time? Is the information received accessible and easily understandable? Do you encounter any other difficulties in this respect? What is your impression of CBM consideration of the local and national context in its approach? 	Partners' directors, Project managers, Sectoral focal points, Field officers, HR directors, Finance Directors
Adaptation to the needs of partners, Equal decision-making and Trust	<ul style="list-style-type: none"> Do you think that your needs and priorities are taken into account by CBM Global? Why ? Do you think that your needs and priorities are leading the CBM global partnership? Why? Do you feel that you have an equal relationship with CBM Global in terms of decision making and accountability? Why or why not? Would you like to be more involved and have more responsibility at each stage of the partnership? How ? Do you see CBM Global as a partner or as a donor? Why ? 	Partners' directors, Project managers, Sectoral focal points, Field officers, HR directors, Finance directors
Financial matters	<ul style="list-style-type: none"> What do you think of the financial support received from CBM Global? How could the financial transfer process be improved? What do you think of CBM Global's financial requirements? 	Partners' directors, Project managers, Field officers, Finance directors
Non-financial support	<ul style="list-style-type: none"> What exactly do you expect from the partnership in terms of non-financial support? What could be improved ? What kind of support would you like to receive from CBM beyond non-financial support? Are there other non-financial areas where CBM Global can make a contribution in the long term? 	Partners' directors, Project managers, Sectoral focal points, Field officers

Topics	Questions	Interviewees
Networking	<ul style="list-style-type: none"> ▪ What do you think CBM Global's support could do for you to strengthen your presence and increase your influence at the national and international level? To establish links with other organisations and receive further funding opportunities? ▪ How CBM could help your organisation in establishing links between partners? ▪ How could you help CBM to develop its networking? 	Partners' directors, Project managers, Sectoral focal points
Monitoring and Evaluation	<ul style="list-style-type: none"> ▪ What do you think of the Monitoring and Evaluation system? ▪ What can CBM Global improve to avoid delays and ensure quality? ▪ How can we support your organisation to meet reporting deadlines while being responsive to your needs? ▪ Do you think the reports add value to your organisation? How could they add more value? ▪ What do you think of the reporting requirements? ▪ What would you change in the design of the reporting template to make it more useful for you? 	Partners' directors, Project managers, Field officers, Finance directors
Joint Learning	<ul style="list-style-type: none"> ▪ What do you think of the learning system in place between CBM Global and your organisation ? Do you feel that learning is happening in conjunction with CBM Global? What could be improved? Why? 	Partners' directors, Project managers, Sectoral focal points, Field officers
Exit and/or transition strategy	<ul style="list-style-type: none"> ▪ What do you think of the exit or transition strategies put in place for the end of projects with CBM Global? What can be improved in the planning and content? 	Partners' directors, Project managers, Field officers
Feedback and complaint	<ul style="list-style-type: none"> ▪ Is CBM Global open to feedback and complaint? Why ? ▪ Do you feel it is easy and safe for you to make a suggestion or complaint? Why? ▪ Have you given feedback of complaint already? And how have you done it (formal or informal)? ▪ Are you satisfied with the responses to your feedback and complaints? Please explain. ▪ How would you do a formal complaint? 	Partners' directors, Project managers, Field officers, HR directors, Finance directors

Topics	Questions	Interviewees
General questions	<ul style="list-style-type: none"> ▪ How can CBM Global improve the partnership? How can CBM Global add value to the partnership? ▪ What are your expectations from CBM Global? Where and how has CBM Global not met your expectations? ▪ Have you been impacted by the transition from CBM to CBM Global? What have been the positive and negative impacts on your organisation? 	Partners' directors, Project managers, Sectoral focal points, Field officers, HR directors, Finance directors
Conclusion	<ul style="list-style-type: none"> ▪ Are there any other areas for improvement that you would like to address? ▪ What are you more excited about working with CBM Global? 	Partners' directors, Project managers, Sectoral focal points, Field officers, HR directors, Finance directors

Detailed Agency RED recommendations

PARTNER ASSESSMENT

No.	Type	Description	Priority	Feasibility
1.1	S	To integrate in the strategic and guiding documents stronger consideration for the financial and technical capacities of organisations as well as its specificities when conducting the partner assessment	2	1
1.2	S	To integrate in the strategic and guiding documents a 2-way partner assessment, allowing the partner to request and review CBM vision, mission, objectives and operational frameworks	1	2
1.3	O	To review the timing of the process, spreading the workload for the partner more evenly	3	1
1.4	O	To ensure the recommendations delivered are adapted to the capacities of the partners	2	2
1.5	O	To implement a clear communication plan during the partner assessment to ensure a common understanding of CBM Global's expectations, requirements and recommendations	1	2
1.6	O	To create a space for discussion of the recommendations prior to their integration into the Partner Assessment report	1	1
1.7	O	During the assessment, to share CBM Global regulations and requirements so that organisations have time to include them in their own systems.	3	1
1.8	O	To create a capacity building plan with the partner for CBM to increase support to organisations in implementing the recommendations of the partner assessment and share more guidance on CBM Global's own internal policies as models.	1	2
1.9	T	Create and share with the partners a checklist of documents that CBM Global will want to access during the implementation of the projects including field visits and annex it to the contract.	3	1
1.10	T	Create and share a Lexical note to be shared with the partner during the induction of the assessment	2	1

CONTRACTUAL TERMS

No.	Type	Description	Priority	Feasibility
2.1	O	To ensure contracts are formalised before the start of the project implementation	2	2
2.2	O	To ensure all CBM Global requirements including financial reporting are included in the contract. Explicitly indicate in the contract what documents or reporting can be asked to the organisation. Include respective deadlines.	1	2
2.3	O	To detail the process of budget adaptation in case of contextual changes	3	1
2.4	O	To ensure, in the event of a rotation of Country staff, a review of the contract with new commers to avoid possible divergences of understanding with the new staff	3	1
2.5	O	Develop different standardised contract according to the status of the organisation and its capacity (NGO, OPDs, etc)	3	3
2.6	O	In the face of contextual changes, CBM to integrate a specific procedure that would ensure greater flexibility in relation to objectives	3	3
2.7	T	To ensure a common understanding of the terms of the contract, CBM to share with the partners a lexical document integrating all concepts and specific vocabulary used by CBM.	2	2
2.8	T	To include a paragraph in the contract with clarification of the specific roles of each party to the contract	2	2

COMMUNICATION AND CULTURAL SENSITIVITY

No	Type	Description	Priority	Feasibility
3.1	S	Ensure that the views of partners are taken into account with regard to adaptation to the local and national context.	2	1
3.2	O	To clearly identify and share with the partner communication channels to know the right levels of communication and involve the right people (CBM Global, Country Teams and partners)	2	1
3.3	O	Integrate in the process, meetings when CBM and its partner would review the project scope of work, to ensure that there are no gaps in understanding prior to project implementation	1	1
3.4	O	During assessment and project design, ensure that CO does not overstretch partners and that its expectations are achievable	3	2
3.5	O	Strengthen and monitor the ability of Country Teams to engage with partners in line with CBM Global's partnership approach	3	2
3.6	O	Ensure greater responsiveness of Country staff to partners	3	1
3.7	O	Conduct team building sessions between partner and Country staff	3	2
3.8	O	To ensure a common understanding between the international office and the Country Teams when communicating to the partners. Potentially, allow only one channel of communication to the partners to avoid divergences of communication between the different levels of CBM organisation	2	2
3.9	O	Ensure good coordination within the Country Team regarding the information provided	3	2
3.10	O	Conduct regular meetings with Members, Global Official, Country Team and partner staff.	3	2
3.11	T	Facilitate partners' understanding of information available in English by translating some documents, but also by participating in meetings, especially with the international office.	1	3

ADAPTATION TO THE NEEDS OF PARTNERS, EQUAL DECISION-MAKING AND TRUST

No	Type	Description	Priority	Feasibility
4.1	S	To integrate in policy and guideline documents that CBM Global understands and considers the needs and priorities of partner organisations.	1	1
4.2	S	To integrate in the policy and guideline documents promotion of equal relationship with partners to promote trust and equal decision making and avoid the “donor” perception of CBM	1	1
4.3	O	Through a stronger collaboration and coordination with the partner during the project design, ensure that the views and experience of partners are considered in the design and adaptation of the project.	2	1
4.4	O	Ensure that communication with the Country Team is not that of a "recipient donor" by promoting a practice of seeking the views of partners when modifying elements they have developed and providing a justification if CBM Global decides to go against this advice.	2	1
4.5	O	Demonstrate more trust in partners, through autonomy and flexibility, in terms of their knowledge and skills.	2	1
4.6	O	Through capacity building and stronger field presence, ensure that the vision of partnership and knowledge of CBM Global is reinforced among the people in the field to create ownership and motivation.	1	2
4.7	O	In case of Country staff rotation, plan an induction session to ensure a transfer of understanding of partner needs.	3	1

FINANCIAL MATTERS

No	Type	Description	Priority	Feasibility
5.1	S	When developing the Country strategy, ensure a clear understanding of the funding priorities of the implementing partners.	3	2
5.2	S	Establish an emergency fund at Country Team level or allow for pre-financing.	3	3
5.3	S	Develop mechanism to ease flexibility in project funding from different donors in case CBM Global is unable to fund all activities in a project.	1	2
5.4	O	To provide technical support to partners by building their capacity in financial management, monitoring, and tools.	1	3
5.5	O	To include a specific budget for coordination	1	2
5.5	O	To include a specific budget for the implementation of the recommendations made by the partner evaluation	2	3
5.6	O	To better considerate partners feedback in regards to the funds allocated to salaries. To allow specific meetings to review what should or should not be included in the budget	3	1
5.7	O	Ensure flexibility to revise the budget according to the context.	1	1
5.8	O	Ensure that funds are transferred without delay and, if this is not possible, be more flexible about the timing of activities to be carried out.	3	1
5.9	T	Provide evidence that the financial transfer has been made to organisations for their own operations.	3	1

NON-FINANCIAL ASSISTANCE

No	Type	Description	Priority	Feasibility
6.1	S	Through annual sessions with all partners at the Country Team level, strengthen CBM Global's knowledge & Experience sharing strategy	2	3
6.2	S	Continue and improve the provision of organisational and technical capacity building based on prior discussion with partners on their needs	1	1
6.3	S	Integrate in the capacity building strategy to support the partner organisations to become a model of an inclusive organisation.	1	1
6.4	O	Involve field staff in capacity building activities.	1	1
6.5	O	Provide an external adviser/consultant to guide/support organisations on various issues before, during and after implementation.	3	3

NETWORKING

No.	Type	Description	Priority	Feasibility
7.1	S	Integrate in the strategic documents and Country Team budgets activities to enhance collaborative relationships between different CBM Global partners at local and national level to learn, share experience and create synergies.	1	2
7.2	S	Continue and expand connectivity with the regional and international network, even with organisations beyond the same sector.	1	2
7.3	S	Increase support to influence national actors at the political level and raise awareness at the local level through joint advocacy	3	2
7.4	S	Promote and strengthen the visibility of the partner organisation at national and international level.	3	2
7.5	S	Promote partners to other potential donors by strengthening the partners' organisations, acting as a guarantor, and sharing achievements.	3	3
7.6	O	Give more attention to the involvement and image of partners on national and international networking platforms	3	2
7.7	O	Ensure that different positions within partner organisations could participate to meetings and coordination platforms	2	1

MONITORING AND EVALUATION

No.	Type	Description	Priority	Feasibility
8.1	S	Integrate in the Country strategies activities to support partners to strengthen their MEAL system and build the capacity of their staff, both at management and field level.	1	2
8.2	O	Ensure the M&E plan is adapted to the capacity of the organisations and the local context by involving partners in the planning process.	1	1
8.3	O	Be more flexible on indicators and targets so that they can be adapted to the context	3	1
8.4	O	Ensure flexibility in activities implementation when results are achieved	3	1
8.5	O	Integrate in the project documents the CBM Global's MEAL expectations in advance of the project to ensure a common understanding	1	1
8.6	O	Ensure evaluators speak the local language	3	1

No.	Type	Description	Priority	Feasibility
8.7	O	Ensure that evaluation conducted by external consultants are shared with partners and that feedback on the reports is provided to the partners' staff	1	1
8.8	O	Provide a dedicated person to support organisations in MEAL activities according to their needs.	3	3
8.9	O	Increase the number of field visits by Country staff to gain a better understanding of the realities on the ground and to provide an external perspective to partners.	1	2
8.10	T	Develop automated tools to monitor the progress of the project	2	3
8.11	T	Adapt the templates used for reporting to focus more on outcomes, sustainability, impact, and development of new partnerships.	3	2
8.12	T	To strengthen clarity of the project's outputs, add to the narrative reporting template a specific table related to Activities Achievement	3	1
8.13	T	Adapt the reporting templates to the specificity of research projects.	3	1
8.14	T	Reduce the reporting workload of the partners by (1) making the templates more concise, (2) making only one report, (3) making only a summary while allowing CBM Global to have direct access to their software with the data, (4) uploading the data into their system directly.	1	1
8.15	T	Share models in advance to allow sufficient time to the team to analyse them	1	1

JOINT LEARNING

No.	Type	Description	Priority	Feasibility
9.1	S	Conduct more regular national and international sharing and learning events with partner and non-partner organisations, stakeholders, and institutions	1	2
9.2	S	Integrate in Country strategies to conduct joint scientific research to further contribute to knowledge sharing.	3	3
9.3	O	Provide more opportunities for partners to learn from CBM Global by sharing their experiences and lessons learned more systematically and facilitate participation of OPDs and partners in experience sharing and lessons learned meetings	2	2
9.4	O	Ensure that all positions within the partner organisation could share their experiences.	3	1
9.5	O	Ensure that information developed jointly with partners is shared in public meetings by informing and inviting the partner organisation.	3	1
9.6	T	To develop an instant communication tool that would allow CBM Global partners to share the challenges they face in the field and receive immediate feedback from their peers.	3	3
9.7	T	Guarantee that reports containing lessons learned are systematically shared by CBM Global with all partners	2	1
9.8	T	Ensure that there are ways to re-access shared information on best practices and lessons learned, if necessary.	1	2

EXIT AND TRANSITION STRATEGY

No	Type	Description	Priority	Feasibility
10.1	S	Integrate in CBM Global strategic document the importance of exit strategies and community level appropriateness	3	1

No	Type	Description	Priority	Feasibility
10.2	O	Ensure that the exit/transition strategy is discussed during the project design phase by involving relevant stakeholders and integrate a specific section in the project documentation.	1	1
10.3	O	Improve communication and monitoring of the project's long-term impacts	3	2

FEEDBACK AND COMPLAINTS

No	Type	Description	Priority	Feasibility
11.1	O	Ensure that the complaints and feedback mechanism is known to all staff in partner organisations by organising introductory sessions.	1	1
11.2	O	Create more opportunities for informal discussions to share views and recommendations for improving the partnership.	1	1
11.3	O	Ensure spaces for open minded discussion between different members from the Secretariat, Country Teams, Members and partner on a regular basis	3	1

IMPACT OF THE TRANSITION

No	Type	Description	Priority	Feasibility
12.1	S	Communicate frequently on the new direction chosen by CBM Global since the transition is understood by its partners.	1	1
12.2	O	Better involve stakeholders by consulting them on changes that may impact them	1	1
12.3	O	Conduct orientation sessions with partners on changes in requirements, processes, tools and systems.	1	1
12.4	T	Share an updated contact list to avoid communication problems	3	1