



**Partner Feedback Survey – Keystone Accountability
Summary Reflections
Church World Service
Maurice Bloem – February 2011**

Every organization relies on information and signals to stay healthy: whether from the marketplace, the media, the grapevine or even from within itself. Humanitarian and development assistance agencies receive signals from many places, yet rarely do we receive systematic feedback from Southern partners - our closest allies in community and global transformation.

Church World Service is pleased to share assessments from its Southern partners as reported in the *NGO Partner Survey 2010* by Keystone Accountability. The survey gathered dynamic data and perspectives from 1,067 partners, on behalf of 25 INGOs they work with. CWS's partners generally commend the agency's performance, assess our strengths, confront us with critiques, and provide credible benchmarks as we seek to improve our effectiveness, relevance and reliability as a partner.

In a nutshell:

Keystone Partner Surveys collect independent and anonymous feedback from Southern partners to generate improvement-oriented findings for Northern INGOs. A group of INGOs decided to participate in a joint exercise wherein Keystone sent the same questionnaire to all participating INGOs' partners. With the data, Keystone wrote an agency-specific report for each INGO, comparing its performance to sector benchmarks that emerged from the entire process. The comparison allows NGOs to identify specific strengths and areas for improvement. The survey process is designed to be simple, effective and ethical.

Why Church World Service participated:

Because of CWS's attention to medium and long-term strategy, including its strategic plan for 2012-2015 and the agency's 2020 future vision process, soliciting feedback from partners now was deemed very relevant. We also felt that the survey's benchmarking concept as a valid means of planning and marking performance and increased effectiveness was very promising. We wanted to be part of that as early as possible.

Process summary:

The process began in early 2010 with Keystone Accountability and the U.K. INGO membership organizations Bond and NIDOS. A few months later, U.S. INGOs who are members of InterAction joined the planning. In both the U.S. and U.K., the invitation to participate was broadly distributed. A total of 25 agencies (nine from the U.S.) joined the cohort. Five of the U.S. agencies have faith-based core constituencies.

Participating agencies reviewed and revised the questionnaire. Selected agencies also piloted the final version prior to the official survey. In addition to the core questionnaire, each agency could include four questions specifically directed to their partners. Keystone translated the survey into French, Spanish and Portuguese.

Keystone conducted the survey from August – September 2010. By December, each participating agency received a confidential report about its performance. Keystone released a public report on 12 January 2011 with results for the entire cohort of agencies. This report is on its website. The public report may be translated.

With the reports in hand, participating agencies should now discuss and verify the findings with their partners in order to identify and implement specific organizational improvements.

CWS Details:

CWS submitted the names of 49 partners for this survey and 24 responded – a response rate of 49%, which was well above the cohort average. We did not include any partners from the North America region. Excluding the North America region, CWS participates in approximately 120 partnering relationships of the sort that could generate meaningful responses to the feedback survey.

Some of these partners had recently experienced budget cuts resulting from CWS's financial challenges and so we expected that they might have been inclined to be extra harsh with us. All but one agency requested a copy of the public report.

Summary of findings for CWS:

- CWS received mid- to high-level ratings from partners, ranking us in the top quarter of the cohort;
- We are positively noted for flexibility and good relationship-building abilities;
- We are not rated as well by our partners as we would wish on capacity building;
- Partners also tell us that we need to be more forthcoming about future plans and invite their input.

What the survey results couldn't capture:

- We think the “representativeness” of the partners we selected for the survey was adequate. However the tight scheduling and time available to organize our participation likely left gaps in partner feedback.
- In some countries such as Vietnam, Cambodia and Laos CWS works closely with government partners, however we did not survey them this time. In future surveys, including government partners may require adjustments to the questionnaire.
- The U.S. group of INGOs who participated in the survey along with CWS was quite small – nine agencies out of 180+ in InterAction. Therefore, while we're pleased with how we compared to our peers this time, maintaining that rank will be more difficult as more agencies participate.

Results (organized by survey section)

The results below follow the structure of the report prepared by Keystone. We are encouraged – even proud – of our performance as reflected by partners' feedback. Not surprisingly, some feedback exposes areas of our work that require improvement. Lastly, the findings occasionally lead us to more questions which we must examine internally and with partners.

Section 1: Partnership profile

Glow: As the most important reason for working with CWS, partners identified “to achieve shared goals”.

Grow: We didn't receive any feedback from partners with small budgets (< \$10,000).

Wonder: Almost one-half of respondents have worked with CWS for more than six years – are we overlooking new prospects? Does this position us well for some of the new directions as envisioned for the future CWS or could this be a hindrance?

Section 2: Financial support

Glow: Almost 2/3 of respondents think that CWS makes appropriate contributions to core costs.

Grow: 75% of grants are approximately 12 months in duration.

Wonder: 70% of respondents agreed that the way we phase payments is appropriate to manage cash flow yet the written comments were quite critical.

Section 3: Non-financial support

Glow: Our support for monitoring and evaluation as well as strategies and practical approaches are valued most by our partners.

Grow: Our efforts to publicize partners' work don't rate very high from a partner perspective and we are consistently in the bottom half of the cohort on advocacy, communications, networking and sector advice. How could we do a better job here or explain in a better way why we do what we do?

Wonder: It seems that we've really missed the mark in our capacity building efforts. Is this because our capacity building is insufficient and/or inadequate (a cause for concern, if true)? How significant is it that we often support partners' capacity building objectives by facilitating their participation in interventions that are ultimately delivered by a third party?

Section 4: Administration

Glow: Partners express satisfaction with their partnership agreement procedures with CWS. This translated into a high ranking for CWS relative to other INGOs. This is encouraging, yet if we diversify our funding, we might have to change some of agreement procedures and then our partners might be less satisfied. Clarity and transparency will be crucial if our procedures change to align with new donor requirements.

Grow: On issues of amount and length of support, almost a quarter of our surveyed partners did not agree that those matched their needs, and even those who agreed did so only barely. This deserves some attention since half of our partner relationships last for more than six years.

Wonder: Even though partners rate CWS very positively on personal visits and program discussions by e-mail or phone, they indicate that we're not clear enough about how information is used, nor do we encourage partners to review work with stakeholders. How can we better convey final products back to partners?

Section 5: Relationship and communications

- Glow:** Partners rate the way we relate with them very high. If we are able to scale our projects, we might either need more staff to maintain this positive relationship or be prepared to hear that partners are less positive about us. Again, being clear and transparent about any possible changes will be crucial.
- Grow:** Barely a third of partners agreed that CWS had a complaints procedure they could use. As an organization that aspires to operate in line with international norms and standards for accountability, we seriously need to look into this response.
- Wonder:** Partners rate CWS very high on ease of interaction. They are comfortable raising questions and discussing problems. Yet on specific issues such as discussing organizational strategy, concluding a relationship or transparency on funds use, partners tell us that we do quite poorly. Perhaps those subjects are still too delicate for partners to initiate or for us as staff to broach with partners.

Section 6: Understanding and learning

- Glow:** Partners rate CWS quite high on sector understanding as well as its track record for learning and improvement. This is really encouraging since it's exactly where we would like to be.
- Grow:** In sectors that we concentrate our work (water, nutrition, climate change, emergency response) partners by and large do not see CWS as a leader.
- Wonder:** Overall, the INGOs in this cohort generated unimpressive scores on learning from mistakes. Partners have insights to which we should pay attention and need to learn from for improvement of our actions and to strengthen our collaboration further.

Tailored Questions

CWS designed its tailored questions to contribute to the 2020 learning process. Responses to those questions provided helpful information for staff and the CWS Board of Directors with respect to how we are seen in different contexts and what program areas our partners prioritize.

First steps forward:

Analyze and discuss across the agency and with governance: Various staff teams in the U.S. as well as international regional offices analyzed and discussed the report in January, while the Planning Committee reviewed it in February. The CWS Board will receive the report at its March meeting.

Go public: CWS will post its private report plus initial reflections to our website. The public report is already available on the Keystone site.

Translate: CWS is planning with other InterAction partners to translate the public report into Spanish and French.

Analyze and discuss with partners: This summary and a discussion guide will assist CWS Regional Coordinators to discuss the main findings with the rest of their staff and their partners. These conversations will verify and deepen the analysis, demonstrating also that CWS intends to act on the feedback it received.

Act on the findings: Based on the discussions described above and our own internal analysis, CWS will identify two to three specific areas for improvement and make the improvements.

Collaborate with peers: CWS will continue participating with other Interaction members to address accountability and build on the success of the partner feedback survey. Together we'll refine agency practices and drive up standards in the sector and establish meetings with funding agencies. CWS will work toward the same ends with Christian Aid and the ACT Alliance and other partner networks.