The principle of **Partnership** in the new ESF programmes (2007-2013)

A framework for programming

Report by an ad hoc working group of Member States on Partnership

**EQUAL Managing Authorities of
Belgium (Nl), Austria, Czech Republic, Germany, Greece, Poland, Portugal and Sweden**

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Background and focus

Working in **partnership** is a fundamental requirement for **the preparation, implementation, monitoring and evaluation of Operational Programmes** under the Structural Funds. Recognising the benefits of learning from one another, in July 2005 government officials involved in the management of the EQUAL Community Initiative and in the planning of the 2007-2013 ESF programmes agreed to set up an ad hoc **Working Group of Member States on Partnership.** This Group organised a platform for Member States to share the lessons learnt in the current period, particularly under EQUAL, and to exchange ideas and plans on ways to use the ESF to maximise innovation and learning.

The primary aim of this note is to assist – in a very practical way – individuals in Member States who have been tasked with preparing and implementing the new ESF programmes 2007-2013. It serves to help them answer some of the questions that they are likely to be faced with at the planning stage, such as:

- What does partnership *actually* mean within the context of an ESF programme?
- What benefits can partnership offer, both strategically and operationally?
- What are the options for when and how partnership might be incorporated into an ESF OP?
- What are the key considerations and critical success factors to take account of when specifying implementing provisions?

This report was developed **by Member States for Member States** and therefore **reflects the experience and opinion of this working group.** The note is to be viewed as the result of a "living document" that has been enriched over time based on contributions from a range of sources and in a variety of fora. So far, the note draws on initial contributions from the Belgium Flanders ESF Agency which took the initiative to coordinate and to steer the drafting work. It has been elaborated through comments and contributions from members of the working group, comprising representatives from: Belgium Flanders (lead), Austria, the Czech Republic, Germany, Greece, Poland, Portugal and Sweden. In addition, it has been further developed thanks to the discussion and input from delegates (representing all 25 Member States) who attended a Partnership Learning Seminar held on 19 January 2006.

For initial clarification, this note focuses only on partnership from the programme perspective. Whilst it does discuss and gives examples of partnership at the project level, it does so to highlight considerations for ESF planners and implementers.

The reflection note is structured as follows:
- **The first part** (sections 1 and 2) – explains why partnership **is relevant to the new ESF programmes**, and presents the added value to be gained from fostering partnership. This part may be of particular interest to **decision-makers responsible** in the Member States when deciding on the **strategy and priorities of the ESF** and their consistency with the Community Strategic Guidelines for Cohesion
- The **second part** (sections 3 and 4) is aimed at those responsible for **drawing up the programming documents**. This part identifies implementation options at Operational Programme level and highlights some implementing provisions critical for success.

The note also comprises a number of annexes giving and signposting to additional information on partnership.
- Annex 1 summarises key issues, in the form of checklists, to assess how well partnership has been integrated into a new ESF programme
- Annex 2: presents key considerations and actions for ESF planners and implementers
- Annex 3: summarises the experience with promoting Partnership in the EQUAL programme
- Annex 4: presents EQUAL case studies demonstrating how partnership works
- Annex 5: lists further information sources on partnership

1. Relevance of partnership to the new ESF programmes

Underlying the partnership principle are two basic ideas:

- Firstly, the experience that today's challenges and opportunities regarding employment, social inclusion and learning have become too complex and interdependent for any one institution to effectively respond to alone. This calls for a **multi-level and integrated approach** which has become an underlying theme of the Lisbon reform agenda and all associated European policy documents.

  In this context, partnership is based on the experience that multi-dimensional problems can only be successfully tackled when organisations, with profiles and competencies that complement and reinforce each other, co-operate actively by developing synergies, and by sharing visions and objectives, opportunities risks, commitments and tasks, competences and resources. Building "**bridges**", "**interfaces**" or "**one stop shops**" that bring together different and uncoordinated services and support structures can resolve difficulties that, in isolation, individual organisations would be unable to deal with.

- Secondly the recognition that economic growth and the ability to cope with economic and social change depend not only on the amount of natural and physical capital available and the quality of the human capital accessible, but also on the "social capital" developed. **Social capital** is understood, broadly speaking, as links and interactions between economic and social actors and the way they organise themselves to generate growth and development, covering informal social networks, bridges and ties between communities, and formalised relationships between institutions.

  In this context, partnerships can be a development tool by provide a framework for dialogue and action to **mobilise all stakeholders** in a labour market issue, thereby contributing to good governance and a greater ownership of the Lisbon reform objectives, in particular at regional and local level. The involvement and support of trusted organisations in the modernisation and delivery of labour market policies in turn can help to increase the **acceptance of necessary reforms** by stakeholders and citizens.

  Emerging from this is the other important and related principle of **empowerment**: working in partnership can help to directly engage disadvantaged groups and their organisations, give them a voice in the political arena, and build capacity to act strategically. Thus partnership and empowerment ultimately ensure holistic and sustainable solutions to labour-market issues.

Community Strategic Guidelines

The Community Strategic Guidelines 2007-2013 stress the importance of building good-quality partnerships between all stakeholders. These partnerships, particularly at regional and local level, have proven to be a highly important factor in ensuring the effectiveness of cohesion policy within the context of the Lisbon reform agenda. They, along with '*promoting civil participation in the formulation and implementation of public policies, as well as improving the interaction between and within the communities, can contribute to the creation of human and social capital, leading to sustainable employment growth, competitiveness and social cohesion. In this context, it is important for the key stakeholders at national, regional and local level to rally behind the reform agenda so that resources are genuinely concentrated on the growth and jobs agenda, and put in place the necessary partnership networks to this effect.*'[1]

In response to such a clear partnership message in the Guidelines, it will be essential for the resulting National Strategic Reference Frameworks (NSRF) and the Operational Programmes (OP) to reflect and describe clearly how a wide range of partners will be mobilised and engaged in the new ESF programmes.

General Regulation for the Structural and Cohesion Funds

Partnership at programme level features explicitly in the General Regulation for the Structural Funds. Article 10 calls on Member States to work in close co-operation with both the Commission and '*the most representative partners at national, regional and local level in the economic, social, environmental and other spheres.*

The Monitoring Committee for Operational Programmes, representing the partnership at programme level, shall ensure the quality and effectiveness of their implementation (Art. 65).

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[1] Cohesion Policy in Support of Growth and Jobs: Community Strategic Guidelines, 2007-2013, COM (2005) 904, p.11.

Within this framework*, **the partnership shall cover the preparation, implementation, monitoring and evaluation of the operational programmes.** Member States shall involve, where appropriate, each of the relevant partners, and particularly the regions, in the different stages of programming within the time limit set for each stage* (Art. 10).

ESF Regulation

Articles 3 and 5 of the ESF Regulation require Member States to **promote partnership** as a direct means of underpinning the Convergence, and Regional Competitiveness and Employment objectives (Art. 3), as well as a broad and essential feature of good governance (Art. 5*). Its support shall be designed and implemented at the appropriate territorial level taking into account the national, regional and local level according to the institutional arrangements specific to each Member State*.

The ESF Regulation specifically addresses **partnership at the level of beneficiaries** and calls for

- **direct support of partnerships** by "*promoting partnerships, pacts and initiatives through networking of relevant stakeholders, such as social partners and NGOs, at national, regional, local and transnational level in order to mobilise for reforms in the field of employment and labour market inclusiveness*" (Art. 3.1e); and

- **indirect support for partnerships**
  - by encouraging *adequate participation and access of social partners and non-governmental organisations to the funded activities, notably in the domain of social inclusion, gender equality and equal opportunities* (Art. 5.3 and 5.4).
  - by allocating, *under the "Convergence" Objective, an appropriate amount of the ESF resources to capacity-building, which shall include training, networking measures, strengthening the social dialogue and activities jointly undertaken by the social partners, in particular as regards adaptability of workers and enterprises* (Art. 5.3).

In short, the ESF Regulation stipulates the involvement of partners and adequate consultation and participation of other stakeholders, with particular emphasis placed on two specific areas:
- in terms of territory by taking into account the national, regional and local and transnational level; and
- in terms of stakeholders by involving the social partners and other non-governmental organisations.

2. Costs and benefits of working in partnership

Partnership between different organisations and institutions requires an extra layer of organisation and complexity compared to working independently; there are more individuals to co-ordinate, more – and not always convergent – ideas, interests and agendas to take account of, and potentially more risks of difficulties and conflict along the way.

Resources, time, political will and ability to adjust and compromise are thus needed. Faced with this prospect, it is only sensible to ask: Why work in partnership? Why invest in bringing partners together when it might be far simpler to proceed alone? If coordination costs and efforts exceed the additional benefits, the answer may still be that partnership is not the most efficient approach to tackle a problem.

Evaluations at national and EU level as well as the joint Commission/Member States working groups have highlighted the value added of working in partnership. Looking closer at EQUAL, the following benefits of working in partnership have been identified:

Partnership at programme level has helped:
↪ governments and key stakeholders to develop and share visions, strategic objectives, and implementation principles, and, more specifically, to transform the Lisbon reform agenda to the regional and local level, and to the social partners and the voluntary sector;
↪ to generate sufficient political or public support and understanding to legitimise action by mobilising stakeholders and developing understanding, commitment, ownership and support;
↪ regional and local authorities, social partners, and NGOs to build and further develop capacities to contribute to the preparation, implementation, monitoring and evaluation of an public support programmes and actions;
↪ to ensure that public support addresses key issues and therefore is based on a suitable response to policy needs;

Partnership approach at project level has contributed to
↪ improving efficiency of actions by
 – avoiding duplication of efforts and promoting the use of complementary approaches or resources in a coordinated and synergetic way;
 – achieving economies of scale;
↪ Increasing effectiveness of actions by
 – addressing real needs which are linked to multi-dimensional (involving a variety of actors and perspectives) and multi-level (involving different levels of society in terms of local, regional and national) issues;
 – bridging gaps in services and provision that no one single organisation could fill;
↪ Empowering stakeholders and building strategic and operative capacity by
 – stimulating learning through sharing of expertise and experience between actors;
 – promoting understanding of different organisational cultures and objectives, particular to different types of stakeholders (e.g. between public and private sector);
↪ focusing on relevance of and commitment to an action by
 – bringing together all stakeholders in defining the issue to be addressed as well as its solution;
 – increasing sense of ownership, especially at regional and local level;
↪ Contributing to and reinforcing other related principles of ESF support such as transnational co-operation, empowerment, equal opportunities and innovation;
↪ developing new role for public sector institutions, such as acting as catalyst rather than motor for change
↪ Producing outcomes and results that are sustainable based on the commitment and ownership that has already been invested by the partners.

All of the above benefits are highly crucial and relevant to tackling key issues to be addressed by the ESF. As such, ESF planners and implementers are encouraged to carefully consider the advantages of incorporating partnership in their programmes, or conversely the disadvantages of not, taking into account the additional resources and time needed to establish and maintain partnerships.

That said partnership is becoming increasingly recognised by stakeholders in labour market issues as offering additional and quite specific benefits over and above those gained by working singly. Moreover, these benefits - both in terms of the process and the outcome of working in partnership - are highly suited to addressing the complex and multi-faceted issues that today's employment, social inclusion and human resource development policies are faced with. In some cases, the advantages of working in partnership are even critical to deliver the planned results, in other words, under certain conditions partnerships may be the only suitable approach to tackle a problem effectively.

3. Opportunities for integrating partnership into the new ESF programmes

According to Article 5 of the ESF Regulation, the promotion of good governance and partnership is an essential element of any OP. This means that partnership as a principle should be adequately addressed in the NSRF and OP documents, and that programme objectives and implementing provisions provide sufficient scope and resources for applying partnership throughout the programme life cycle.

Before designing any partnership-based intervention, it is important to consider the options available in terms of:
- appropriate levels and conditions on which the partnership principle can be integrated and applied
- effective ways and methods for working in partnership

a) Levels of integration

The new Regulation provides obligations and opportunities to address partnership
- at all programme levels, and
- throughout the whole cycle of programme implementation (design, management, monitoring and evaluation).

Programme level structures and procedures

The provisions of Article 10 of the General Regulation requires Member States to apply the partnership principle right from the beginning in the preparation of the Structural Funds interventions and to involve *the most representative partners at national, regional and local level in the economic, social, environmental and other spheres*.

The most important tasks of the partnership in the **preparation** of the 2007-2013 period will be
- to contribute to the preparation of the NSRF through active participation in the consultation process (Art. 26.1)
- to contribute to the drafting of the OPs, through cooperation with the designated bodies for drawing up the OP (Art. 31.1).

Experience has shown that the active **engagement of all relevant stakeholders in the very early stage** of programming is crucial for the successful implementation of a programme. The use of participative workshops[2] helps to ensure that the programme addresses relevant issues, through techniques such as situations analysis, and to develop shared ownership in the main policy responses that constitute the basis of an OP. In addition, participation of key stakeholders is needed to establish programme objectives as well as specific targets and indicators for priority axes that reflect the common understanding of the nature of problems and the results that can be achieved. The listing of appropriate target indicators and of indicative operations is indispensable for the functioning of reporting mechanisms that allows a Monitoring Committee to fulfil its tasks.

On the basis of this legal requirement, Member States should seek an active, broad, balanced ands transparent participation of the relevant partners in the process. The description of the involvement of the partners in preparing the NSRF and the OP in the programming documents therefore should therefore mention
- the individual partners and other actors that have been involved, the responsibilities of actors and the definition of the scope of their participation;

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[2] Sourcebook on sound planning of ESF programmes, Report resulting from the ESF seminar in Vilnius 17-18 November 2005

- how the identification of relevant partners has respected the principle of transparency, and made been made public ;
- actions taken to facilitate a wide involvement and active participation.

The regulatory mechanism to involve the partnership in **programme implementation**, monitoring and evaluation are the **Monitoring Committees**. Their main function is to supervise the assistance of the Structural Funds, to check on how it is being managed by the Managing Authority, to ensure compliance with its own guidelines and implementing rules and to review evaluations.

The members of a Monitoring Committee are appointed by the Member State. In selecting the partners, Member States will have to identify *the most representative partners at national, regional and local level in the economic, social, environmental and other spheres[3]:*
- Stakeholders representing regions and local authorities play an increasing role in the delivery of employment, social inclusion and HRD policies;
- Social partners have a central role in the broad partnership for change, and their commitment to strengthening economic and social cohesion by improving employment and job opportunities is essential.
- NGOs could be relevant partners for actions in the field of social inclusion.

In any case, the involvement of partners should take into account the promotion of equality between men and women. A first step towards gender mainstreaming would therefore be a gender balance amongst their members.

The EQUAL experience has shown good practice in implementing partnership at programme level, which can serve as a model for organising the involvement of stakeholders the new ESF programmes:
- The Monitoring Committees have included a broad range of partners to accommodate the specific needs, competencies and capabilities of organisations working with, or representing disadvantaged groups in society.
- Representatives of key stakeholders became members and contributed actively to the work of ad hoc thematic networks with the aim to learn directly from the good practice developed
- The partnerships funded included representatives of key stakeholders as "strategic partners" that would ensure relevance and sustainability of the work and the results achieved.
- In view of the "strategic" involvement of stakeholders at the level of beneficiaries, clear rules of procedures for the project evaluation Boards and Monitoring Committees have been established to rule out any conflict of interest in the selection processes.

Project level

The experience of EQUAL demonstrates that there are also significant gains from making partnership an underpinning principle at beneficiary level. As indicated above, complex, multi-dimensional problems in the social and employment arena can be solved more effectively and efficiently if projects are structured around a partnership, rather than one organisation acting on its own.

b) Effective implementation provisions

Good governance implies that the implementation arrangements and allocating resources for the promotion of partnerships would comply with the following general criteria:
- **flexibility** in the design of the OPs.
- **concentration** on issues and areas that have the highest need and show the most promising results.
- **administrative simplicity** in specifying the implementation arrangements.

These criteria are particularly useful for ESF planners and implementers when considering how and to what extent to apply partnership at the project level. EQUAL experience has shown that partnership yields benefits that can exceed the loss in flexibility and simplicity.

The new ESF Regulation has integrated this experience by explicitly including, in the list of ESF priorities, the promotion of "*partnerships, pacts and initiatives through networking of relevant stakeholders, such as social*

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[3] General Regulation, Art. 10

partners and NGOs, at national, regional, local and transnational level in order to mobilise for reforms in the field of employment and labour market inclusiveness" (Art. 3.1e).

In order to make effective use of this funding opportunity, Operational Programmes could to make a number of operational provisions, in particular by

- specifying the types of partnerships to be supported
  This could be done by**:**
  - applying a **broad definition of partnership** including consortia, networks, working groups with clear a clearly defined mission, capacity-building and activities jointly undertaken by the social partners (under the Convergence Objective according to Art. 5.3 of the ESF Regulation) etc;
  - covering projects carried out **by actors from different sectors** (public, private and voluntary sector);
- **selecting specific fields** and priorities regarding issues and themes for which a partnership approach would generate a clear value added, that are **coherent** with the frameworks for policy reforms and for the modernisation of the economy; and **flexible** enough to accommodate other issues
  EQUAL has shown that partnerships can definitively add value in a **range of fields,** which could also be considered for the new ESF programmes. These include
  - reaching out to integrate disadvantaged target groups into the labour market, such as migrants or people with disabilities;
  - developing effective links between institutions and organisations to achieve a seamless transition to, and integration into, the labour market e.g. between education and work; work and life-long learning; inactivity and work; prison and work; migration and work; family/private life and work;
  - developing new synergies at local, regional ad national level ("systems integration") by establishing new interfaces between organisations; new modes of coordination and cooperation between institutions and support organisations; or networking and partnerships between stakeholders;
  - more effective policy delivery and support structures, such as pathways to integration and employment , or new training approaches for lifelong learning.
- defining **eligible activities** that cover all phases of a partnership development and operations, ranging from the identification and assessment of suitable partners to guiding and training in participatory planning and management.
- stimulating the formation of, and supporting applications from, partnerships of **social partners and non governmental organisations**
- establishing sound and **clear guidance for the operational** and financial requirements of establishing and managing partnerships, in line with national legislation and rules, and taking into account good practice developed under EQUAL[4]
- establishing a set **of key principles** to be applied by partnerships, including:
  - **Simplicity** – a partnership can tend to be complicated due to the number and type of partners involved, and the varying needs and interests that they bring with them. To avoid confusion and alienation, it is critical that the partnership arrangements are simplified wherever possible.
  - **Flexibility** – a partnership is by no means a fixed structure. It is likely to change over time, as will the environment in which it operates. There needs therefore to be flexibility built into any rules, plans and working arrangements that are agreed upon.
  - **Clarity** – a common problem is a lack of understanding amongst the partners, which can lead to conflict and serious difficulties in implementing the work of the partnership. It is essential to provide time to share and discuss different perspectives from the very beginning, so that the partnership has a clear basis from which to move forward.
  - **Consensus** – the level of ownership and commitment of partners can make or break a partnership, particularly if the partnership is to remain active over an extended period of time and if its results are to be sustained beyond the lifetime of the funding. All of the partners must agree on what they are seeking to achieve and how they are going to work together.
  - **Empowerment and equality** – it is important to recognise the needs and interests of partners who may not traditionally carry the same "weight" as other partners and/or may not have any prior experience of partnership working. These partners - such as NGOs, representatives of target groups, smaller

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[4] such as the role of the partner responsible for administrating the public funds

businesses – have an important stake in the partnership, so must be given adequate opportunity to exercise this stake through democratic and participative approaches.

4. "Top six" considerations and implications for ESF programme designers and managers

Based on the experience of EQUAL and elsewhere, partnership presents a rich opportunity within the new ESF programmes. However, as with any principle or action, the ultimate success of implementing partnership on the ground – whether it at programme or project level – is very dependent on maximising the success factors and avoiding the pitfalls. Moreover, given the relatively short timeframe for delivering the Lisbon objectives (2010), it is critical that this happens right from the start of ESF programme planning. EQUAL has shown that partnership working can be a steep learning curve for ESF programmes and projects alike, so the more that can be learnt from and built upon this experience, the quicker and more fruitful the rewards of partnership will be for the new ESF programmes as well as the Lisbon agenda generally.

Beyond these principles, there is a wide range of more detailed considerations and actions that ESF planners and implementers should take account of and prepare for in their work. The six most important considerations and actions are listed below, all of which have been broadly supported through the EU-wide and national external evaluations of EQUAL. ESF planners and implementers are encouraged to refer to these considerations and actions, and use them as an initial "checklist" when preparing the NSRF and OPs, as well as the more detailed managerial and technical assistance arrangements for partnership working further down the line.

1. **Investment** – The level of resources for setting up and managing a partnership cannot be underestimated. Those partnerships that have encountered difficulties under EQUAL have often had inadequate financial and human resources to properly deal with the day-to-day demands of the partners working together. Partnerships that have had a dedicated partnership resource – for example, a full-time partnership co-ordinator or partnership management team – or have invested in tools and support for the partnership have been far more successful.

    ✛ **At programme level, support of partnerships has to acknowledge that developing consensus between different partners around a strategy for action has to include the provision of specific resources for management and co-ordination, but that this delivers value for money, as the alternative – unstructured political bargaining or learning - tends to be more costly.**

2. **Knowledge, skills and capacity-building** – There is a significant lack of knowledge, skills and experience of working in partnership, across all types of organisations and institutions involved. Therefore any partnership undertaking should plan and invest in opportunities for learning and development, including:
    o   Training seminars, ideally of short duration and tailored to the specific needs of the partners.
    o   Written guidance on topics such as finance, monitoring, strategic planning, partnership working, and ad hoc advice through helpdesks.
    o   Coaching and mentoring between more and less experienced partners.

    ✛ **At programme level, support of partnerships has to lower the threshold for less experienced key stakeholders at local and regional level to participate in the programme, by providing guidance and training, resources for training and learning, and opportunities for sharing good practice.**

3. **Time** – Partnerships take significant time to set up and implement. More often than not, the time estimated falls way short of the time actually needed, which can lead to delays, low-quality outcomes and a general bad feeling amongst the partners. Therefore is critical that partners are contributing their time as part of their main work commitments, and that their time invested in the partnership is managed properly. Effective time management includes: allowing sufficient lead-in times to key activities, dedicating time to initial planning and thinking, and making sure the time available is properly resourced with staff and technical support.

    ✛ **At programme level, effective support of partnerships without previous cooperation experience has to provide time for the preparatory and initiation phase of a project; EQUAL has shown that sound project definition takes around six months.**

4. **Sound planning, monitoring and assessment of achievements** – EQUAL has shown that projects using a professional planning tool were more relevant, coherent, effective and efficient, if such tools were used from the start, and used consistently throughout the project lifecycle. Monitoring (and evaluation) efforts are easier for project managers if the tools are used

   a) **Agreed aims and objectives** – Given that partners have their own organisational interests and objectives, it is important to clearly define the aims and objectives of the partnership as a whole. A good starting point for this is actually defining the common problem that needs to be tackled. If the aims and objectives can be linked directly to the interests of each individual partner, then it provides an added incentive for partnership working as the partners can see explicitly how they will benefit.

   b) **Clear roles, responsibilities and structures** – A common problem for partnerships is their failure to clearly identify, define and get agreement on the roles and responsibilities of each partner, right from the start. If this important process is not gone through, then gaps in activity, as well as conflict can easily arise, all of which undermines the goodwill and positive relations of the partnership. It is therefore important to clearly establish structures that assume these roles and responsibilities within the partnership.

   c) **Strong day-to-day co-ordination and management** – Partnerships can be extremely demanding in terms of the level of daily co-ordination and management that they require. Irrespective of whether it is taken on by one single partner or shared amongst several partners, this co-ordination and management role must be firmly established and cover both the strategic and operational aspects of the partnership.

   d) **Written agreements** – To underpin the main undertakings and working arrangements of the partnership, it is strongly advised to put in place written agreements, ideally ones that are legally constituted. These not only help to confirm the commitment of the partners, but can also mitigate against any difficulties and misunderstandings at a later stage.

   e) **Early involvement of partners** – It is quite easy to confine the partnership planning and early implementation to a smaller, more confined group of partners. To ensure the ultimate effectiveness of the partnership's activities, all of the partners must be involved at an early stage.

   ✎ **At programme level, effective support of partnerships has to request projects to apply an effective method for partnership planning and management. Consider e.g. 'Project Cycle Management'[5] which has been tested with more than 300 Development Partnerships from 8 Member States as a solid and sound approach.**

5. **Simplified rules and procedures** – A general observation is that the rules and procedures concerning partnership, and any legislation where it applies can be extremely restrictive and impractical. In order to work effectively, partnerships need agreed rules and procedures that can work flexibly according to the practical situations on the ground. Areas where partnerships experience most difficulty include: financial rules, monitoring requirements and stipulations concerning public procurement.

   ✎ **At programme level, efficient partnerships are not overburdened with administrative work and financial management. For the new programme period, eligibility rules shall be laid down at national level. These should include provision for giving partnerships the necessary flexibility.**

6. **Support services** - Under EQUAL, the National Support Structures are providing effective support to many of the above considerations and actions. This support included guidance in identifying suitable partners, setting up the partnership, planning for delivery and assessing achievements.

   ✎ **At programme level, effective programme management will have to ensure that technical assistance at OP level will be made available to support projects in terms of strategy development and planning, formalising and building true partnership, using communication, reporting and evaluation systems, maintaining partners' involvement and commitment, and sharing results and the lessons learnt.**

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[5] See annex 5

Beyond the above list of top six, an extended list of the key considerations and actions for ESF planners and implementers is provided in the Annex.

In **<u>conclusion</u>**, partnership is a highly essential and beneficial working principle for ESF programmes, even more so given the complex and multi-faceted employment and social inclusion problems that these programmes seek to address. As the experience of EQUAL has shown, sustainable and effective solutions to the challenges of the Lisbon reform agenda are increasingly reliant on the direct and active participation of all stakeholders at European, national, regional and local level. **Partnerships are therefore a cost effective and sustainable way of introducing change.**

Partnership can be managed and implemented successfully within an ESF programme providing there is adequate planning and preparation upfront and a clear awareness of the issues as mentioned in this Reflection Note.

Beyond the ongoing contributions of the ad-hoc working group, *all* Member States are invited to share their ideas, experiences and reactions to partnership working within the context of ESF programmes. If you wish to discuss any aspect of the reflection work on partnership, please contact the coordinator of the working group on Partnership, Louis Vervloet louis.vervloet@ewbl.vlaanderen.be

ANNEX 1 – Self-Assessment Checklists

The following checklists have been developed to facilitate a robust assessment of how well the promotion of partnership has been integrated into a new ESF programme.

Following the programming procedure and the requirement to establish coherent programming documents, three checklists are provided:
✣ the first on ex-ante evaluation,
✣ the second for the National Strategic Reference Framework, and
✣ the third for Operational Programmes.

The checklists should not be considered as exhaustive. The analysis of every specific situation may lead to the integration of further points.

The checklists have been elaborated by a working group of Member States and reflect the opinion of this working group. Where they go beyond regulatory obligations, the working group took account of standards of good practice.

- **Check list on ex-ante evaluation**
  The issues addressed refer to the Commission's Draft Evaluation Working Paper for the New Programming Period, 2007-2013 on Ex Ante Evaluation.[6] As stipulated in the General Regulation (Art. 46.3), *the Ex-ante evaluation shall aim to optimise the allocation of budgetary resources under operational programmes and improve programming quality. It shall identify and appraise the disparities, gaps and potential for development, the goals to be achieved, the results expected, the quantified targets, the coherence, if necessary, of the strategy proposed for the region, the Community value-added, the extent to which the Community's priorities have been taken into account, the lessons drawn from previous programming and the quality of the procedures for implementation, monitoring, evaluation and financial managem*ent

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- **Check-list on innovative activities in the National Strategic Reference Framework**
  According to Art. 25 of the General Provisions Regulation of Structural Funds, the National Strategic Reference Framework (NSRF) constitutes a reference instrument for preparing the Programming of Structural Funds.
  The check-list below refers to different articles on the NSRF in the general provisions Regulation of Structural Funds.

- **Check-list on innovative activities in Operational Programmes**
  Art. 5 of the new ESF Regulation stipulates that "*the ESF shall promote good governance and partnership*".
  The check-list refers to different articles in Titles III (Programming) and IV (Efficiency) of the general provisions Regulation of Structural Funds.

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[6] http://ec.europa.eu/regional_policy/sources/docoffic/working/doc/exante_sf2007-2013_en.pdf

Checklist for ex-ante evaluation

	Suggested information to be included in the ex-ante evaluation
Socio-economic analysis	• Assessment of the outcomes of partnership structures at programme level and partnership based activities in 2000-2006 programmes (in particular EQUAL) and lessons that can be applied to the new OP. • Which features of policies or delivery systems to promote employment, social inclusion or investment in human capital would benefit from partnerships building "bridges", "interfaces" or "one stop shops" that bring together different and uncoordinated services and support structures
Assessment of the rationale of the strategy	• Assessment of the potential added value of planned support of partnership • Assessment of how the partnership approach will be integrated into the programme at programme and project level • Assessment of the financial implications of the promotion of partnerships
Coherence of the strategy	• Description of how the promotion of partnerships will contribute to achieving the objectives for employment and social inclusion in the National Reform Programme. • Assessment of the contribution of partnerships to innovative activities, and to transnational and interregional co-operation • Relevance of proposed indicators

Checklist for the National Strategic Reference Framework

	Suggested information to be included in the National Strategic Reference Framework
Socio-economic analysis	• SWOT analysis covers working in partnership
Strategy	• Description of partnership at programme and project level • Short description of the main elements of the support for partnerships (objectives, types, themes, and support capacity)
Preparation of the NSRF	• outline of the individual partners and other actors that have been consulted, their responsibilities and the definition of the scope of their participation; • how the identification of partners involved has respected the principle of transparency, and made been made public ; • actions taken to facilitate a wide involvement and active participation of partners in the preparation of the NSRF.

Note: As regards "earmarking", the envisaged contribution to innovative activities could be attributed to the earmarking category "Mobilisation for reforms in the fields of employment and inclusion"

Checklist for an Operational Programme

	Suggested information to be included in Operational Programmes

Programme analysis	• SWOT analysis covers the promotion of partnerships
	• Description of the process for identifying themes for the promotion of partnership, and justification of the selected themes for innovative activities as regards :
	    o The main lessons learned from EQUAL and other ESF 2000-2006 evaluations on promoting partnerships (what has worked, and why, critical success factors; added value)
	    o the findings of the ex-ante evaluation as regards the policy needs and opportunity costs of partnership based activities
	    o the capacity to establish effective partnerships of key stakeholders at national, regional and local levels
	• justification of the selected themes and issues in terms of links /consistency with the overall socio-economic analysis and with the national reform agenda
	• main needs of social partners relating to capacity building in the field partnership (for convergence objective)

Programme strategy	• Description of the strategy for the promotion of partnership (overall vision, relevance, specific objectives, themes, types of activity, and support capacity; expected contribution to the Operational Programme's strategic objectives) • Description of how promotion of the promotion of partnership based activities will be implemented as a across cutting approach; • Description of the interrelationships between the promotion of partnership and the support of innovative actions • Description of coordination structures and procedures within the programme and with other Structural Fund interventions - in particular other interregional and innovative interventions – and with other innovative programmes in the field of education and training. • indicative breakdown by Lisbon categories Note: the envisaged contribution to innovative activities should be attributed to "Mobilisation for reforms in the fields of employment and inclusion"
Programme priority axes	• Description of how the promotion of partnerships will contribute to the specific objectives of each priority axis (where appropriate) • List of indicative operations (types of eligible activities) • Definition of specific objectives and identification of sound output and impact indicators (where appropriate, at the level of a priority axis) • Description of how Technical Assistance resources will be used to support the promotion of partnerships (nature of support services envisaged; level of resources made available; management arrangements planned) Note: this may be described under a separate Technical Assistance priority
Implementing provisions	• What are the mechanisms for ensuring that the funding of partnership based activities activity will be maintained throughout the life of the OP • How will simple, flexible and effective management structures and eligibility rules be ensured at programme and beneficiary level? • How will management flexibility and sound financial management (project level) be reconciled? • How will it be ensured that of partnership based activities will deliver results (will the use of established project planning tools be required/recommended/supported)? • How will MA/NSS arrange themselves to make sure that the above mentioned provisions are professionally handled? • What procedures are planned for ensuring that partnership is applied programme level (including the composition and gender balance of the Monitoring Committee)

| | • What special provisions will be provided to implement activities of social partners? |

Annex 2: Key considerations and actions for ESF planners and implementers

Partnership membership and structure

- Pay special attention and effort in securing the participation of private companies, especially when they are key stakeholders in the partnership activities.

- Involve policy makers and politicians, from the beginning, which helps to maximise the mainstreaming impact.

- Consider the partnership membership in its broadest and non-traditional sense; for example, if there has been a long tradition of working in partnership with social partners, can the membership be extended to include NGOs, private companies and other organisations representing the target groups?

- Provide opportunities for the target groups to be *directly* represented on the partnership.

- Make clear the distinction between a real partner, and a sub-contractor or supplier.

- Maximise the involvement of employers' organisations to take account of supply and demand issues.

Consensus, commitment and understanding between the partners

- Partners can often have difficulty in scoping and defining what exactly is meant by "partnership". It is therefore important to establish a common understanding, being mindful that:

  o The definition of partnership *in theory* can be different from partnership *in practice.*

  o A confusion can arise between whether the partnership is an objective in itself or an instrument for achieving an objective.

  o Partnership can be viewed solely as a financing instrument, rather than a strategic working method and/or opportunity for knowledge and learning.

- Identify the expectations of the partners' rights at the start.

- Be mindful that partners have different, sometimes conflicting interests.

- Promote compromise and flexibility.

- Identify and promote the benefits of working in partnership.

- Share information as regularly and openly as possible.

- Be mindful that:

  o If partnership is a requirement, partners may be participating reluctantly and therefore lack a real commitment.

  o There can appear to be consensus on the surface, but in fact strong differences underneath.

  o For some partners, there can be a strong tradition of working alone.

Communication and interaction between the partners

- Special attention should be given to ensure that innovation found or created in a partnership is fed back into participating organisations. The system to create this should be in place already from the beginning, for example through the level of representation in a partnership.

- Partnership work should be supported by and benefits from a formative and process-0oriented evaluation which can support reflection and a self-critical attitude.

- Allow for the fact that some partners will progress at different rates and their level of input will vary over time due to their role in the partnership.

- Organise brainstorming and consultation sessions to foster discussion and learning between the partners.

- Be mindful that the partners have different political and financial power, which can significantly affect the dynamics of the partnership.

Partnership work planning and management

- Acknowledge that some partners may not have made a financial investment (for example, non-profit making organisations), but nevertheless have an important stake hold in the partnership activities.

- Be mindful of the smaller or less financially robust organisations to ensure that they are included on an equal basis.

- Anticipate potential areas of conflict – particularly political ones – and put pre-emptive measures in place.

- Maximise complementarity with other programmes such as those funded through the ERDF.

- Always consider the transnational dimension of the partnership activities, as well as other wider contexts.

- Listen to the ideas and input of all partners when work planning.

- Pay attention to ensuring that the national implications of strategic action at regional and local level are included in the work of the partnerships, and vice versa.

- Consider Project Cycle Management as an effective method for partnership planning and management.

Annex 3: Partnership in the EQUAL programme

Experience shows that partnership as a term can be interpreted in different ways, ranging from:

- relatively loose consortia of projects that follow their own orientation, but present themselves under a common heading; to

- tightly integrated entities that may have their own legal identity.

This spectrum of partnership interpretations can be seen within the context of the EQUAL initiative, both at project and programme level.

Project-level experience

EQUAL has substantial and unique experience of partnership-working, having funded over 3,300 strategic alliances of key stakeholders, the so-called Development Partnerships (DP). The DP partner organisations have included public authorities, employment services, social partners, NGOs, training organisations and employers, mainly at local and regional level, but also in some cases nationwide. For each DP, these partners are required to agree and present their common aims, objectives and activities in the form of a Development Partnership Agreement - which has become a cornerstone partnership document for the EQUAL programme.

Beyond the basic structure and working arrangements, the following quote encapsulates well the underpinning ethos of a DP:

'The difference between a Development Partnership and a project is that you don't just want to change the world around you, in a Development Partnership you also have to be prepared to change yourself.' (Co-ordinator in the EQUAL programme in Sweden)[7].

Partnership working is also reflected in EQUAL at the transnational level, which provides yet another source of experience. Every DP is required to work in partnership with at least one DP in another Member State, with the view to achieving additional outcomes and synergies across national boundaries. This collaboration is underpinned by a Transnational Co-operation Agreement, which all of the participating DPs sign up to.

Programme-level experience

EQUAL's experience of partnership working has not just been confined to the project level, but has extended to programme planning, implementation, monitoring and evaluation, as carried out by the EQUAL Managing Authorities (MA) and National Support Structures (NSS). These MAs and NSSs have broadly operated and participated in two partnership structures at the programme level, namely: National Thematic Network (NTN) and European Thematic Group (ETG). The NTNs have brought together policy makers, experts and other stakeholders to engage and collaborate with DPs, and work to maximise the dissemination and mainstreaming impact of EQUAL at the national level. This approach has been mirrored at the European level in the form of the ETGs and meetings of MAs, led by the Commission. Whilst being more fluid and less formal than the project-level partnerships in EQUAL, both the NTN and ETGs have helped to extend the community of EQUAL and thereby its impact as a whole.

Another example of partnership working at programme level is the establishment of a national Monitoring Committee for the overall management of EQUAL in the Member State. Committee members have been specifically chosen to represent all those parties with a stakehold in the smooth delivery and results of EQUAL, including national government departments, regional and local authorities, social partners, business support

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[7] 'On the Art of Developing Partnerships', National Institute of Working Life, p.11.

agencies, relevant NGOs, as well as the National Support Structure and appointed external evaluator. The committee meetings have provided a forum for all views to be expressed and heard, and key decisions to be taken in a consultative way in respect of the programme.

Partnership within the context of other principles

EQUAL DPs have been required to address other principles alongside partnership, namely gender mainstreaming and equal opportunities, innovation, transnational co-operation and empowerment. These principles feature significantly in the draft ESF Regulation (particularly under Articles 6 – 8) and therefore reinforce the relevance and value of EQUAL's partnership experience.

EQUAL's experience of empowerment deserves particular mention because of its direct link to partnership working. EQUAL DPs have been successful in involving regional and local stakeholders, as well as reaching out to marginalised and target groups, as part of their project design, management and delivery. In many cases, these partners have been new or inexperienced to ESF programme activity.

Validation of EQUAL experience

The outcomes and success of EQUAL partnerships – at both project and programme level – have been recorded and validated in a number of ways. A range of national and European publications have been produced, including good practice guides and thematic reports. Evaluation work, undertaken by the MAs and Commission, have also helped to identify and validate partnership practice in EQUAL. In some cases, Member States have undertaken particularly innovative activity to harness and disseminate the successful outcomes of EQUAL. One example of this is the Portuguese NTN which has been based on the Community of Practice model whereby DP outcomes have been shared with and validated by the network participants.

Annex 4: EQUAL case studies

EQUAL provides a rich source of examples of how partnership can be successfully made a requirement for one or more priorities. These examples are wide-ranging, dealing with legal and contractual issues on the one hand, to support and capacity-building measures on the other. However, they all share a common feature in terms of making partnership "work".

Greece: Development Partnership as a legal entity

It could be said that the partnership model in Greece is not a "simple" one. However, the seemingly "rigid" measures undertaken by Greece provided an effective means of overcoming the lack of relevant partnership tradition in Greece. Before EQUAL, Greek organisations had little experience of building networks and other kinds of partnerships. Some existed, but they were not very efficient and lacked the resources to achieve wider impact. In addition, the approach to networking was often decided upon from above, leading to unequal situations where a small group of partners with a lot of political weight could easily veto any initiatives coming from those lower down the "pecking order".

EQUAL marked, in a sense, a revolution, as for the first time, partnerships were given the same voice as the "big" policy and decision-makers, based on the principles of democracy and equality. Below are two examples of how this was achieved.

In the framework of Action I (preparatory phase), EQUAL DPs in Greece take on their own legal identity based on a law (2956/2001, Article 42). This law was issued specifically in order to facilitate the implementation of EQUAL through strategic, effective and durable partnerships bringing together all relevant actors. It regulated and exemplified partnership matters, such as the:

- Legal status of the DP (not-for-profit private legal entity).
- Decision-making procedures.
- DP administration bodies, and their responsibilities and mandate.
- Participation of public organisations, as well as central and regional administration agencies.
- Issuing of joint decisions by the Ministers of Economic Planning and Employment to regulate all matters concerning the performance, application, management, finance, evaluation and control of EQUAL DPs.

Action III (the dissemination and mainstreaming phase) is structured around the partnership and networking model through the NTNs. According to their working model, NTNs do not operate simply as a fora for dialogue, but also as a dynamic mechanism where relevant actors undertake dissemination, and horizontal and vertical mainstreaming. The NTNs structure their work according to a detailed dissemination and mainstreaming plan, the so-called Common Work Programme. Their working approach is one of empowerment between the DPs and their partners. The overriding objective of collaboration between the relevant DPs, in the context of a Common Work Programme, is to achieve the maximum impact of the EQUAL and its results.

Overall, the Greek experience demonstrates how partnership can be made an important and effective cornerstone of an ESF programme. The situation now, according to the Greek external evaluator, is that networking and partnership within EQUAL represents a significant area of good practice.

Austria: Territorial Employment Pacts

In Austria, support for partnerships is currently being offered within the framework of the Structural Funds programme (ESF, 2000-2006) on an intensified basis by means of a specific focus in the Objective 3 programme (priority 6). In addition, the implementation of EQUAL benefits from the Territorial Employment Pacts (TEP) due to the integration of TEP actors in DPs. In the first application round of EQUAL, 45 % of all

DPs were supported by the TEPs, whilst in the second round, the TEPs participated in the establishment and implementation of 34% of the DPs.

To sum up, in 2000-2006 partnerships are a special priority in Austria and are a requirement for projects in EQUAL. As for the next Structural Fund period, discussions currently centre on the "raison d'être" of the partnerships. Consideration is being given to whether the TEPs should continue to serve as "strategic co-ordinating fora" in the regions and/or also implement measures and projects themselves.

At present, the TEPs' strengths lie in co-ordinating the various topics and policies in the regions by combining partners' budgets and thereby using synergies between different programmes. By asking the partnerships themselves for their vision for the future (2007+) e.g. during a TEP-Workshop organised in May 2005 (Vienna, 11. May 2005, TEP_Vision 2007+), the answers as regards the major point of discussion mentioned above varied per TEP. If there is a handing over of additional budgets to the TEPs as suggested from the Austrian ESF Board recently , ways have to be found to avoid conflicts such as the TEPs will then fulfil two, partly incompatible functions, such as deciding on the support of projects and implementing projects.

Latvia: Capacity-building for partnership

The Ministry of Welfare is currently implementing a European Structural Fund national programme to build the capacity of the relevant ministries, state agencies, social and regional partners. Of the seven projects financed through this programme, one specifically focuses on capacity-building for partnerships entitled: Capacity-Building in State Employment Agency and Promotion of Co-operation Partnerships.

The services offered through the State Employment Agency (SEA) consist of the administration of 27 district offices, 6 client service centres and 25 sectors across the whole of Latvia. The geographic accessibility of these services is relatively well established, however, before the project activities were implemented, the SEA's limited general skills and professional capacity meant that the quality of the services was not always guaranteed. Moreover, there was insufficient information on the options and responsibilities of individuals facing unemployment, as well as a lack of co-operation possibilities between the SEA employees and its partners (namely social partners and other institutions involved in the administration of the labour market) aimed at solving these employment problems.

The aforementioned partnership project directly addresses the need for skills development, capacity-building and co-operation opportunities and specifically includes the development of labour-market partnerships across the SEA's organisational network. This development includes:

- Facilitating information exchange between the SEA, its 27 district offices, local municipalities, employers and other partners.
- Organising joint training events.
- Supporting meetings of local advisory councils responsible for employment promotion and elaboration of local employment action plans.

Currently there are 27 local employment councils working in Latvia. The work of these councils is co-ordinated by the project staff. In the SEA local employment councils, there are represented partners from SEA branches, municipalities, employers, trade unions, educational institutions and NGOs. All local councils have agreed on local action plans for employment for 2006. Introduction of the SEA local employment councils has already increased the level of interest and responsibility in employment issues by local communities.

Belgium (Flanders): RESOC and SERR

Two Flemish partnerships have recently been set up under as part of the OECD Co-operative Action Programme on Local Economic and Employment Development (LEED) Forum. These are: the Regional Socio-Economic Committees (RESOC) and the Socio-Economic Councils of the Region (SERR). Their underlying rationale is to provide a strong advisory and consulting structure in their respective regions, providing both bottom-up and top-down information and opportunities to influence socio-economic policy development. The main focus of their work is the development of a Regional Pact which includes strategic choices and solutions for resolving socio-economic problems. The work also involves the organisation of bipartite consultation on economic and labour-market issues and the provision of advice on labour-market policies and bipartite measures.

The mains partners of RESOC are local and provincial authorities (with their representative acting as the partnership President), social partners, VDAB (Flemish Public Employment Service) and NGOs. SERR differs slightly insofar as it is a regional bipartite body of the social partners, presided over by one of their members. Since the launch of the partnerships in 2004, these partners have benefited from having yearly sub-regional action plans, a Regional Pact endorsed by all of the relevant stakeholders, an active role in stimulating diversity planning in companies, as well as several innovative projects leading to structural adaptations in policy (for example, the introduction of family and business audits in companies).

Sweden EQUAL: Diversity in Västernorrland Development Partnership

Diversity in Västernorrland sought to raise the awareness of groups such as senior citizens, disabled people, the long term unemployed, people on long-term sick leave and minority groups, and encourage their integration into the labour market in a region with a declining labour supply due to an ageing population and issues of emigration. Promoting diversity was being put forward as a useful approach for the region to ensure a competent labour supply and a labour market without discrimination. The partners engaged were the County Administrative board, NGOs, the municipalities of the region, labour unions, employment offices, the Confederation of Swedish Enterprise, the Social Insurance Office and the Swedish Agency for flexible learning.

The challenge for this endeavour was to engage all partners as active owners of the partnership work. The partnership was developed from a collective of passive partners engaged mainly in their projects, to an "active" partnership with shared responsibilities and partners being active owners of the common issue. The main success factor for this development was a strong coordinator who stressed the importance of joint actions in order to achieve mainstreaming and political impact. The incentives for the partners were twofold: to accomplish innovations and change their separate projects, and to raise awareness on a regional level. The partnership had more legitimacy than each partner organisation would have had acting as an individual organisation.

Diversity in Västernorrland also points to the importance of putting the partnership work into a wider context, which is like to the county's long-term vision to promote diversity and opportunities. The partnership' s context-setting, as well as its active and strategic work to engage politicians at the regional level, has been vital in achieving changes and sustainable development at a structural level. The outcomes of the partnership have included, for example, models for the rehabilitation of the mentally disabled, for learning in small enterprises, re-entering to or stay in the health-care sector after long time sickness or as seniors. On a structural level, the partnership work has put diversity on the agenda as an area of growth potential for the county and developed a foundation for sustainable strategies and co-operation concerning diversity and growth.

Portugal EQUAL: ConVidas (Permanent Platform for Reconciliation) Development Partnership

In order to encourage online co-operation among institutions, various local entities were invited to take part in a Permanent Platform for Reconciliation of Work and Family Life, intended to be a broad network that is representative of different interests and approaches.

In total 32 organisations participated in the Platform. They include representatives from: five formal partners (Beira Serra -Local Development Association, Covilhã Municipal Council, Business Nucleus, the Joint Trade Unions of Castelo Branco and University of Beira Interior) as well as from Regional Social Security authorities; Employment Centre and Health Centre; Educational Coordination; Parents' Association - Primary and Secondary Schools; 10 Parish Councils from within the catchments area; two entrepreneurs; two trade union delegates; two representatives of the family support services (children, elderly, disabled) and a Public Transport Firm. The overwhelming advantage for these organisations has been the opportunity to meet on a quarterly basis and to reflect on, discuss and assess the situation in the Covilhã area. Through this collaborative and discursive approach, the partners have been able to work in a more holistic and synergistic way with regards to the issue of reconciliation, leading to the development and monitoring of interventions to resolve the identified problems.

Annex 5: Further information sources on partnership

1) An important part of the good practice developed under EQUAL has been validated and documented in two Guides used by Development Partnerships in the second round:

- The **EQUAL Guide for Development Partnerships -** Learning from the experience of EQUAL partnerships offers orientation, good practice examples and practical tips for building and maintaining effective partnerships, covering all five key processes (preparatory work, initiation, development and testing, mainstreaming and planning for further action) and also the specific skills these processes necessitate.

- The **EQUAL Partnership Development Toolkit** – a practical guide to participative planning, monitoring and evaluation for facilitators of EQUAL Development and Transnational Partnerships - provides tools both for identifying issues, for presenting these and their inter-relationships for conceptualising innovative solutions, linking them to user needs and for organising these processes in an interactive way with stakeholders.

2) In addition, considering programme level partnerships in the form of Thematic Networks, good practice developed under EQUAL has been validated and documented in the **Practical Guide to Mainstreaming - a guide supporting the work of Managing Authorities and National Support Structures** and covering the key steps needed to facilitate the transfer of the main policy and practice innovations that have been tested under EQUAL, in which Thematic Networks and the way they should operate are referred to.

3) The **Report resulting from the ESF seminar in Vilnius 17-18 November 2005: Sourcebook on sound planning of ESF programmes** contains a valuable collection of programming tools related to the four pillars of sound programming(Strategic orientation and coherence,. delivery planning,. monitoring and evaluation, stakeholder engagement)

4) The **Background Document for the EQUAL Evaluation Conference 23 – 24 February 2006** includes "proposals for action" in relation to partnership based on the evaluation of the EQUAL programmes across all Member States.

5) **The New Programming Period, 2007-2013 – Methodological Working Papers: Draft Working Paper on the Ex-Ante Evaluation** takes account of the methods and scope for partnership within the new programming period, as well as the involvement of partners in undertaking the ex-ante evaluation itself.

Other useful sources of information include:

OECD LEED Forum on partnerships and local governance – www.oecd.org/cfe/leed/forum/partnerships

On the Art of Developing Partnerships, National Institute of Working Life, Sweden – www.arbetslivsinstitutet.se

Partnership – a guide for Development Partnerships, GB Equal Support Unit – www.equal.ecotec.co.uk