

March 2023

## **Partner selection**

*Selecting winning partners for women's economic empowerment*



# Foreword

The **WIN program** was set up in Mozambique to advance women's economic empowerment (WEE), especially among women entrepreneurs, using a Market Systems Development (MSD) approach.

MSD programs work with market actors (private and public sector) to design and test ways to improve the functioning of a market for the benefit of a specific target group – in this case, low-income women.

The selection of the right partner is therefore very important and often quite challenging, especially in an under-developed market such as Mozambique.

The guide was created to help other MSD programs to select the right partners to make market changes systemic, and work for low-income women.

The guide is part of a four part series on designing, implementing and monitoring impactful MSD programs to advance WEE. The four chapters are: **Sector Selection and Analysis**, **Partner Selection** (this tool), **Intervention Strategy** and **Monitoring, Learning and Evaluation**.

The information in this guide is based on the Women IN Business (WIN) program, a five year MSD program funded by the Swedish Embassy and implemented by TechnoServe on Women's Economic Empowerment in Mozambique. WIN-specific examples are highlighted throughout, to show how the theory can be put to practice.

For further guidance, contact the Women IN Business team at:

## **TechnoServe Moçambique**

Av. Cahora Bassa 114 - Maputo - Mozambique

T. +258 21 498 437

E. [technoserve-mozambique@tns.org](mailto:technoserve-mozambique@tns.org)

F. [facebook.com/WomenInBusinessMozambique](https://www.facebook.com/WomenInBusinessMozambique)

***win-moz.org***



# Definitions

## Women's economic empowerment (WEE)

The process by which women and girls are able to succeed and advance economically and have the power to make and act on economic decisions.

## Market systems development (MSD)

A development approach that works through market actors (typically private companies and public organizations) to engage the poor and help sustainably grow their incomes and livelihoods.

## Sector

A term used by WIN to identify the area of operation of the target group.

## Verticals

A term used by WIN to identify the areas where the program's partners can be found. Verticals represent service areas, functions or influences that impact how well women can perform in the main sector. In other programs they might also be called "sub-sectors" or "entry points".

## Gender analysis

Gender analysis is a process to understand the relationships between women and men, their access to resources, their activities, and the constraints they face relative to each other. Companies can use this process to identify opportunities with women and men through their business operations.

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# Process from scoping to intervention



## Scope

- ▶ Define the target market and desired impact
- ▶ Select main sector(s)



## Select verticals

- ▶ Create long list of potential verticals (sub-sectors)
- ▶ Prioritize verticals (sub-sectors) based on gender analysis of potential for impact on target group



## Analyze

- ▶ Gender Analysis of the vertical to identify gender gaps and barriers
- ▶ Map market actors with incentive and capacity to resolve constraints



## Select partners

- ▶ Hold initial conversations with mapped actors
- ▶ Hear the ideas from the market
- ▶ Evaluate and select most relevant actors



This guide



## Design intervention

- ▶ Design activities, gender-responsive M&E plan and budget
- ▶ Decision Committee meeting
- ▶ Negotiate partnership agreement

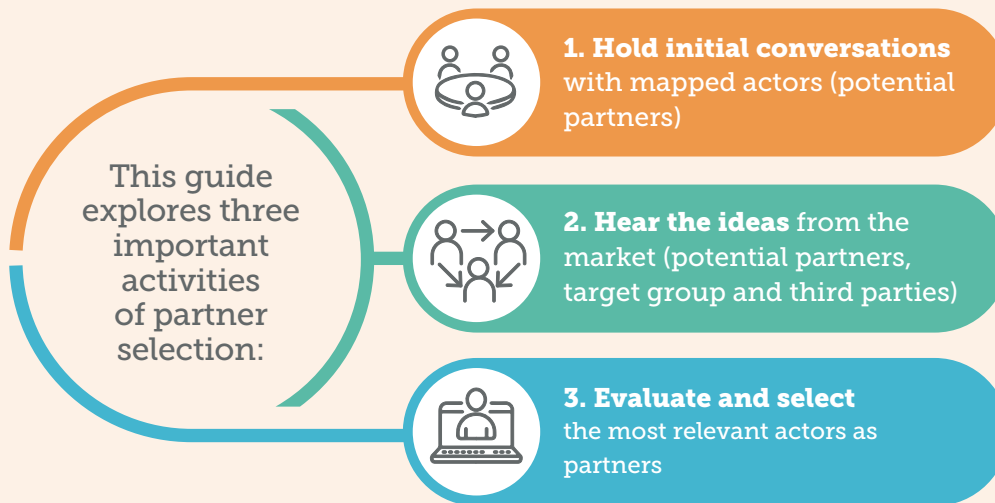
**This process is often iterative, as conversations with partners, and the process of designing and implementing interventions, feeds into program knowledge about sub-sectors**



# Introduction

Partner selection is an important stage in program design, that should come only after the core sector and verticals (areas where potential partners operate) have been analysed. For more details on Sector Selection and Analysis, see WIN's guide on this.

The major players in each vertical are mapped during the Sector Selection and Analysis stage. The Partner Selection process involves selecting the most promising of those players for the program to work with. This process is iterative and non-linear! New partners may be added to the program as interventions are already underway. The program should be opportunistic and flexible in adding new partners.



## WIN experience

WIN uses “sector” to talk about the area of the economy that employs the target group (in WIN’s case, this is micro-enterprise).

To differentiate from “sector”, WIN defined as “verticals” the areas where the program’s partners can be found. Verticals represent service areas, functions or influences that impact how well women can perform in the main sector.

In other programs verticals might be called “sub-sectors” or “entry points”.

# 1 Hold initial conversations

**THE FIRST STEP IS TO SET UP MEETINGS OR CALLS** with mapped actors to gauge interest / opportunity for partnering with the program.

**REFERRALS** – from team members, program consultants, donor contacts etc – are the best way to secure meetings.

**ASK TO SPEAK** to decision makers as early as possible (in the first meeting or subsequent).

**LISTEN TO THE POTENTIAL PARTNERS!**

- ➔ What are their business constraints?
- ➔ Do they already have experience with your target group?
- ➔ What opportunities do they see?

**USE THIS INFORMATION** to assess what the partners' incentives could be to collaborate with the program (e.g. reach a new segment of clients? Improve efficiency? Increase brand value?)

## WIN Case Study

The WIN team presents itself as a small consulting unit that advises private sector (and sometimes public sector) on how they can integrate gender in their operations to create greater impact with their clients and staff.

This framing is important to take focus away from program funding and ensure potential partners understand that, while the program does have funds available to help de-risk the trialling of new ideas, it is not just looking to disburse money.

The program assigns a single intervention manager to each potential partnership, who leads the process from the initial meetings onwards.



# Tool: Executive Pitch

An executive pitch document can be used to “sell” the program to potential partners in a first meeting. The document can then be brought back in later meetings to discuss more concrete intervention ideas.

## Executive pitch document structure:

- 01 Brief background on the program

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- 02 Types of “services” offered to partners, e.g.:
  - gender training of management and staff
  - gender market research
  - expert advisory on methods to reach women
  - co-design of gender marketing, recruitment, incentive, training or other strategy to reach women
  - in-kind and financial support during the piloting of an improved business model to reach women (clarify that this is de-risking funding, and as much as possible try not to make this the focus of the presentation)

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- 03 Previous experience working in this area (of the program or of program staff / implementing agency, if the program is new)

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- 04 The business case for integrating women as agents, clients, or staff members to help solve certain challenges in that sector

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- 05 Broad ideas or models for collaborating with the partner, based on initial discussions

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- 06 Suggestion of roles and responsibilities

First meeting

Later meetings

## 2 Hear the ideas from the market

**The best ideas come from the market.** Often, market actors know their own limitations around engaging women (as clients, agents, service providers or staff) but do not know how to solve them.

WIN tested two models for bringing ideas to the program, both ensuring engagement of the potential partners and target group. Model 1 continues the initial conversations with any interested mapped actors until one or two emerge as having promise. As the process requires many meetings and relies on team judgement, it is best applied in verticals where the number of potential partners is already limited.

Model 2 is a more formal process of running a call for proposals. This is more suited when there are several (e.g. 15 or more) potential partner candidates, all showing interest. Since there are fewer explanatory conversations, it is best applied in markets with some familiarity of partnering with donor-funded programs (using MSD or similar approach), so that market actors are not simply expecting hand-outs.

### Model 1

#### Courtship model:

Iterate ideas over a series of conversations with potential partners

Most applicable for: Small group of potential partners, less familiarity of MSD style donor-funded programs

### Model 2

#### Call for proposal model:

Formally solicit proposals from potential partners

Most applicable for: Larger group of potential partners, more familiarity with MSD style donor-funded programs

WIN's tool on **Intervention Design** covers further details about the design process

## Model 1

### Courtship model

#### Steps to take



Once you understand the partner, the next meetings can focus on developing and iterating ideas for collaboration. Where do the partners' incentives overlap with those of the program and its target group? To be successful, all parties must have something interesting to gain.



Build on this shared incentive to highlight the potential business case for the partner to improve its offering to the target group – whether as clients, staff members or agents / third parties.



As in any courtship, the highest potential partners will often become clear through this process as they keep appointments, and are forthcoming with information and ideas. Questions on page 15 can help the program team ensure they are using their best judgement to assess potential.

### WIN Experience

It takes several meetings with each partner:

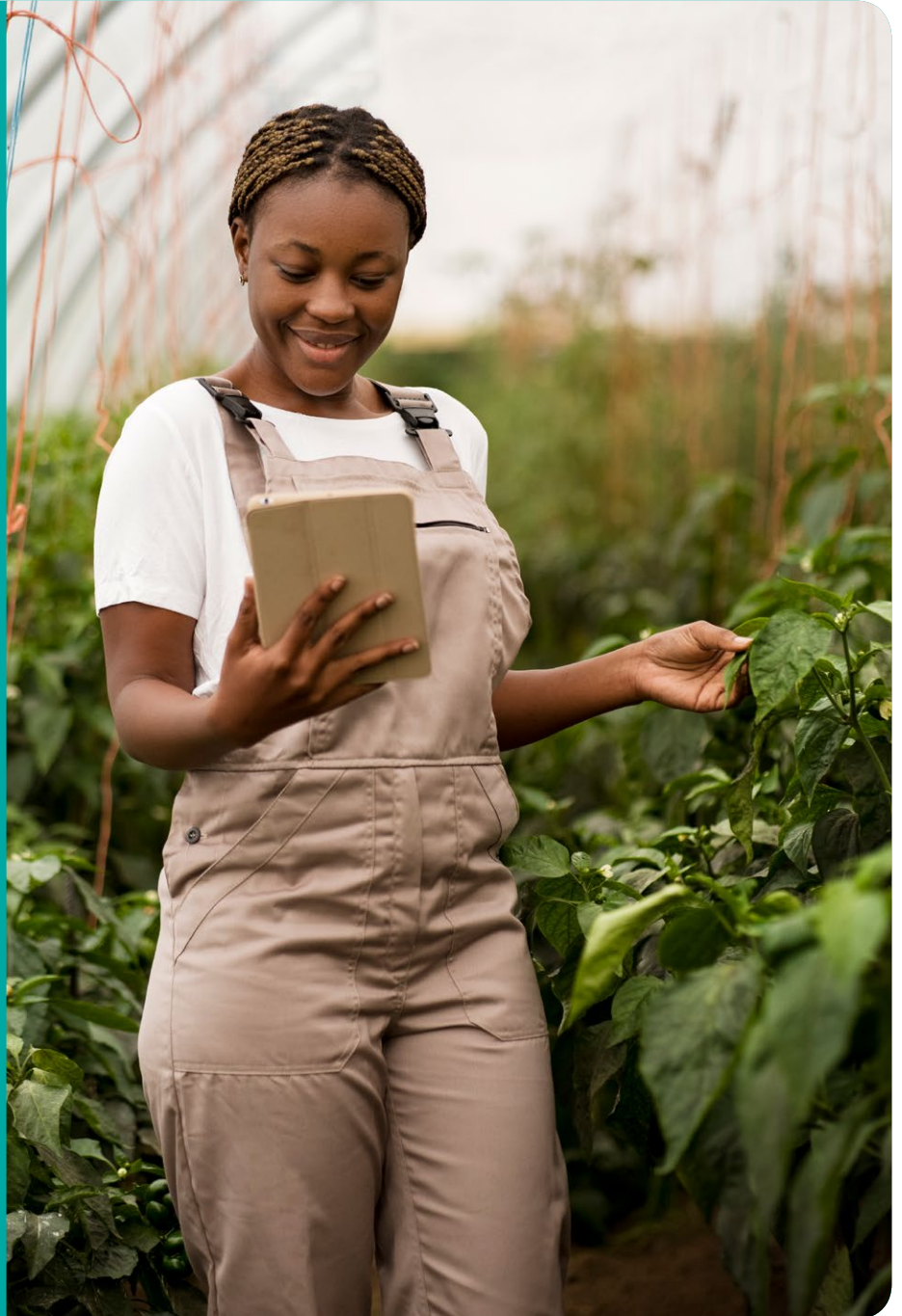
- to ensure you speak with the right people (those with decision-making power and vision)
- to explain the MSD approach - common misunderstandings are a) that the program has a standby group of beneficiaries / customers for the partner; b) that it will do marketing on behalf of the partner and c) that the program is there to give money to the private sector"
- to come to a shared vision of a potential intervention

Use the Executive Pitch document to remind the potential partner what the program is about and build out ideas.

## WIN Experience – participatory design

During partner selection, the program may offer some additional quick activities to build partner buy-in and draw out the best ideas.

- A gender awareness training with senior management builds trust between the program and the partner, and draws out some of the root causes of gender inequity. WIN's Gender Training Tool outlines how this is delivered.
- A quick market research exercise can improve the quality of ideas. WIN often accompanies the partner to the field in the design stage and conducts ad-hoc or even structured interviews with clients. This helps to:
  - ensure potential interventions are built with the participation of the target market
  - build a business case for investment and action by the partner, who may otherwise be unsure whether the idea is something the target group will respond to positively



## Model 2

### Call for proposal model

#### Steps to take



Select a communication method that is likely to reach the largest number of candidates (e.g. national newspaper) and supplement with direct invitations to known candidates.



The call for proposals should set the main objectives and budget but let market actors come with their own solutions. It should also outline clearly the criteria through which the proposals will be judged and selected.



The program may consider giving extra weight to proposals that have evidence of a participatory design approach (i.e. including the target market in the development of the proposal).

### WIN Experience

A call for proposal takes time to set up and receive and select the winning candidates. However, the detail provided in the proposals make it possible to move more quickly to a partnership agreement.

When using a call for proposals, it is still important to spend the necessary time with short-listed and/or selected partners to be sure they have understood the commitments required. Call for proposals is a method used often by granters who expect only reporting in return - whereas the MSD approach expects a greater degree of partnership.

## 3

## Evaluate and select the most relevant actors as partners

The evaluation and selection of a partner requires judgement on the part of the program team.

To aid this evaluation, senior team members should be involved in both the partner courtship and call for proposal models, taking meetings with senior representatives of the potential partner organization alongside the meetings of the intervention manager and their counterpart.

A series of questions can help the program team to assess potential as objectively as possible and avoid falling into any traps created by personal bias (see insert on next page).

The final evaluation should be submitted to the Decision Committee alongside the Intervention Design. See annex for template. The Decision Committee gives final sign off for entering into partnership, providing an extra layer of scrutiny. It, and the Program Director, are also responsible for ensuring that the partners selected work well as a portfolio. For more information on this phase, please see WIN's Intervention Strategy Guide.



# Tool: reflective questions while engaging partners

The following questions can help a program team assess whether a partner shows promise, either during the courtship process or integrated as criteria for assessing submitted proposals.

Where are they on the gender journey?

- Are they committed and willing to make changes within their company and/or add targets that are inclusive of women? Do they see the value in doing so?
- How high is this on their list of priorities?

What is their incentive to work with the program? (alignment of objectives)

- Does the partner see the business (and social) value in integrating gender in their operations? Will it help them increase customer base, reach a new segment, or improve efficiency?
- Or is it just to tick a gender box? Beware of companies that put on a gender “face” to try to attract financing!
- Note the level of enthusiasm / responsiveness, pro-activity in coming up with ideas, and willingness to put in resources.

Possible impact/reach on women in target group

- Does the partner work with, or have the potential to work with, a large base of women clients/agents/partners?
- Do they have a large number of female staff?

Program value add

- Can a partnership with the program bring something different to the business model? Does the partner really need the program’s expertise, or financial de-risking?

Quality of products or services

- Are the partner’s products/services relevant to low income women?
- Do they have high quality products/services worth supporting?

Commercial and financial viability

- Does the partner have financial capacity? Are they profitable? Beware of “donor darlings” that seek multiple sources of donor funding to finance core operations.
- Are they investing their own resources in the intervention, at a level that shows commitment?

Minimum selection criteria

- Are they a registered entity? Do they have a bank account? Do they have a good reputation? Do they have solid organizational management?

Potential support required

- How much guidance will they need? How much time will it cost the team? If they will need a lot of support, evaluate if the potential impact on beneficiaries or the learning opportunity for the program (e.g about the tested model) is worth the resource investment.

3

Throughout partner selection, program leaders should bear in mind the need to manage their portfolio

### Some partners will have **big numbers**

These will help reach impact target numbers

But they can be tricky...

They may be more reluctant to invest as everyone else wants to work with them

They have a lot of competing priorities

And it's difficult to get time with senior leadership

### Others will **have small numbers**

These will help you get closer to your beneficiaries

They will also help you with your learnings about what works for your audience

But... they have lower capacity and may need more guidance

They may be looking at you to fund their core business

And impact will be smaller



# Lessons learned

Partner selection is a critical moment in MSD programming. Here are some things to consider when choosing a partner for a WEE program.

- 01 **Most of the best ideas come from the potential partners and target group** as they know where their challenges are. Involve both of these in the idea generation process.

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- 02 When courting partners, show the **program's value add** – expertise on the target group (women) and helping the partner test ideas together. **Highlight incentives** for the potential partner to be more gender-inclusive.

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- 03 Be upfront with how the program can financially de-risk initiatives. However, don't make it the focus.

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- 04 Partner's level of commitment to WEE is key. **Get to know the partner better to safeguard their interest and capacity**, and move away if the objectives are not aligned.

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- 05 **Don't despair!** It takes time, patience, and a lot of negotiation to develop a partnership!

## Watch out for...

### Distorting of market

be careful of "pet" partners. In thin markets, some firms become expert at positioning for donor money to get ahead, and can put on a gender "face" to do so!

### Lack of ownership

You need to engage the partner during the conception and design stage (work plan, indicators, MEL plan) or you will face a lack of ownership later

### Lack of commitment

If the partner is reluctant to put in its own resources (financial or in-kind), it probably doesn't see the intervention as priority

The following is the  
partnership selection tool  
used by WIN for all its  
interventions



# Sample partner selection tool



The intervention manager completes the partner selection tool, using data from partner meetings and documents to fill it in. This tool is part of a more comprehensive document called the Intervention Strategy, which is reviewed by senior program leadership (e.g. PD or DPD).



The Intervention Strategy is presented to a Decision Committee (including the CD, CFO, Gender Advisor and PD or DPD). Please see this tool for more information on the process.



The Decision Committee gives feedback on the intervention and gives the go-ahead

# Partner selection tool

**Partner overview:**

[Include:

- Partner name
- Key activities
- How long in business
- Position in the market]

**Commercial and financial viability:**

[State whether the partner is currently profitable and whether it is experiencing any issues relating to its viability]

**Rationale for selecting partner:**

[Describe why we would choose this partner rather than another one]

**What is the partner's incentive to collaborate with us?**

[What is the business case? More customers? New segment? Improved efficiency? Achieving established social / environmental objectives? Better brand value? Signalling goodwill to stakeholders?

**Additionality to partner:**

[Why can't / won't the partner do it on their own, without WIN's help?]

**Expected impact on crowding in:**

[Do we expect other organizations to follow this partner? What is the mechanism for doing so?]

# Partner selection CTD – Beneficiaries and impact

**Target beneficiary:**

[Describe end beneficiary – what does she do? Age range? Marital status? Etc]  
[Average and range of income levels for the end beneficiary]

**Size of the impact:**

[Expected nature and size of the impact on beneficiaries (slides 5-6 have more detail on this)]

**How many beneficiaries will be impacted during the intervention?**

[Split out by beneficiary type as relevant. At minimum, capture benefits to women (quantified), men and children (can be directional)]

**How many beneficiaries will be impacted at scale?**

[Split out by beneficiary type as relevant. At minimum, capture benefits to women (quantified), men and children (can be directional)]

**How will the intervention be inclusive of minority groups and disabled?**

# Partner gender assessment

What is the gender split in ownership and/or management?

What is the gender split of employees?

What is the gender split of customers?

What gender initiatives are currently undertaken by partner?

Does partner have a written gender plan / policy or is willing to elaborate one?

# Partner minimum selection criteria

Official entity or individual registered in Mozambique. Not a political party or any affiliate:

YES / NO

Set of accounts (preferably audited) for the past year (shared or visually seen). Solvent:

YES / NO

Possesses bank account:

YES / NO

Respects human rights, Mozambican and international labor laws (preferably with written policy to this end):

YES / NO

Has no prior negative reputation, especially in relation to social, gender, or environmental issues (after reasonable due diligence). Not on restricted party list or engaging in any illegal activity:

YES / NO

Agrees to WIN support, monitoring and to sharing business information with WIN in order to evaluate impact of intervention:

YES / NO

Does the partner have a written environment policy/plan?

YES / NO

**Notes on any partner risks vis-à-vis operations, finance or reputation:**



# Resources

## Internal resources

Sector selection and analysis tool

Accessible via [this link](#)

Intervention strategy tool

Accessible via [this link](#)

MEL systems tool

Accessible via [this link](#)

Partner selection template

Accessible via [this link](#)

## External resources

The Donor Committee for Enterprise Development (DCED)  
– Private sector engagement

Accessible via [this link](#)

Beam Exchange – Private Sector Engagement

Accessible via [this link](#)

Market Systems Development (DevLearn)

Accessible via [this link](#)

Springfield Centre

Accessible via [this link](#)

Vikara Institute – Market Systems Development

Accessible via [this link](#)

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[facebook.com/WomenInBusinessMozambique](https://facebook.com/WomenInBusinessMozambique)  
[win-moz.org](http://win-moz.org)  
+258 21 498 437

**TechnoServe Moçambique**  
Av. Cahora Bassa 114 - Maputo - Mozambique