

THE PARTNERING INITIATIVE

England & Wales · Charity number 1154259

Details

Other names	TPI
Status	Registered
Legal form	Charitable company
Company number	08528402
Registered	2013-10-18
Register	View on the Charity Commission register

Contact

Address	21B Park End Street Oxford OX1 1HU
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Website	thepartneringinitiative.org

Activities

Objects: 1) TO PROMOTE SUSTAINABLE DEVELOPMENT FOR THE BENEFIT OF THE PUBLIC BY:A. RAISING AWARENESS AND PROMOTING THE USE OF 'CROSS-SECTOR PARTNERSHIPS' GLOBALLYB. BUILDING SYSTEMIC, INSTITUTIONAL AND INDIVIDUAL CAPACITY ACROSS ALL SOCIETAL SECTORS TO DEVELOP AND SUPPORT EFFECTIVE PARTNERSHIPSC. DIRECTLY AND INDIRECTLY SUPPORTING THE DEVELOPMENT AND EFFECTIVE DELIVERY OF CROSS-SECTOR PARTNERSHIPS GLOBALLYD. PROMOTING AND UNDERTAKING STUDY AND RESEARCH IN CROSS-SECTOR PARTNERSHIPS AND DISSEMINATING USEFUL RESULTS OF SUCH STUDY TO THE PUBLIC AT LARGE.E. SUPPORTING THE DEVELOPMENT OF AN ENABLING ARCHITECTURE TO DRIVE THE SCALING UP OF THE USE OF CROSS-SECTOR PARTNERSHIPS GLOBALLY2) TO ADVANCE THE EDUCATION OF THE PUBLIC IN SUBJECTS RELATING TO CROSS-SECTORAL PARTNERSHIPS GLOBALLYNOTE: SUSTAINABLE DEVELOPMENT IS DEFINED AS "DEVELOPMENT, WHICH MEETS THE NEEDS OF THE PRESENT WITHOUT COMPROMISING THE ABILITY OF FUTURE GENERATIONS TO MEET THEIR OWN NEED". CROSS-SECTOR COLLABORATION OR PARTNERSHIP IS DEFINED AS "ANY COMBINATION OF PUBLIC, PRIVATE, NGO, UN OR OTHER BODIES WORKING TOGETHER TO ACHIEVE COMMON OBJECTIVES WHICH CONTRIBUTE TO ANY ASPECT OF SUSTAINABLE DEVELOPMENT".

Activities: The Partnering Initiative drives effective cross-sectoral collaboration for a sustainable future through: professional development; building organisations that are 'fit for partnering'; supporting best practice in partnerships; building the infrastructure to systematically facilitate partnerships; and raise awareness of the role of partnerships in development.

Classification

- **How:** Provides Services, Provides Advocacy/advice/information, Sponsors Or Undertakes Research, Other Charitable Activities
- **What:** Education/training, Economic/community Development/employment, Other Charitable Purposes
- **Who:** Other Charities Or Voluntary Bodies, The General Public/mankind

Geography

- Oxfordshire

Finances

Period end	Income	Expenditure	Assets	Employees
2024-09-30	£898,497	£853,780	£409,473	8
2023-09-30	£895,105	£875,046	£364,756	10
2022-09-30	£874,939	£791,198	£344,697	9
2021-09-30	£849,937	£812,664	£260,956	8
2020-09-30	£736,383	£689,269	£223,683	6

Trustees

Name	Role	Appointed
David Croft		2026-05-01
James Cole		2022-01-13
Katherine Hartley		2022-01-13
Marianne Mwaniki		2022-01-13
Marta Garcia Abadia		2022-01-13
Thomas Nathan Hale		2019-03-14

THE PARTNERING INITIATIVE

England & Wales - Charity number 1154259

Accounts



THE PARTNERING INITIATIVE

Trustees' Annual Report and Accounts 2023-24

England & Wales Company Registration: 8528402

Charity Commission Number: 1164259

Address: 21b Park End Street, Oxford, OX1 1HU, United Kingdom

TRUSTEES' ANNUAL REPORT

1st October 2023 - 30th September 2024

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1. LEGAL AND ADMINISTRATIVE INFORMATION

1.1. Trustees

James Cole
Marta Garcia (Treasurer)
Thomas Hale

Katherine Hartley (Chair)
Marianne Mwaniki
Caron Rohsler
Elizabeth Stuart

1.2. Chief Executive

Dr Darian Stibbe

1.3. Registered Office

21B Park End Street
Oxford OX1 1HU
United Kingdom

1.4. Auditors

Wenn Townsend
30 St Giles
Oxford, OX1 3LE, United Kingdom

1.5. Bankers

Metro Bank
4-5 Queen Street, Oxford, OX1 1EJ, United Kingdom

The Trustees, who are also directors of the charity for the purposes of the Companies Act, submit their annual report and the audited financial statements for the year ended 30th September 2024. The Trustees have adopted the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities" (FRS 102) in preparing the annual report and financial statements of the charity.

2. STRUCTURE, GOVERNANCE AND MANAGEMENT

The charity is a charitable company limited by guarantee, set up on 14th May 2013. It is governed by a memorandum and articles of association.

2.1. Organisational structure

The Partnering Initiative operates out of a central hub in the UK with a core staff working on programme development and delivery, partner relations and communication. Our development projects, action research, strategic consultancy support and training services are delivered internationally through both core staff and a global network of highly experienced Associates. A key feature of all The Partnering Initiative's activities is the drawing out of cutting-edge knowledge on the theory and practice of partnership which is then disseminated widely through online knowledge exchange and webinars, guidebooks, reports and other publications.

The Partnering Initiative is run by an Executive Director reporting to a multi-sector independent Board

2.2. Key management personnel remuneration

The Trustees consider the Board of Trustees and the Chief Executive as comprising the key management personnel of the charity in charge of directing and controlling the charity and running and operating the charity on a day-to-day basis. All Trustees give of their time freely and no Trustee remuneration was paid in the year. Details of Trustee expenses are disclosed in note 4 to the accounts.

Trustees are required to disclose all relevant interests and in accordance with the Trust's policy withdraw from decisions where a conflict of interest arises.

The pay of the Chief Executive is reviewed annually and is normally increased in accordance with average earnings. The remuneration is reviewed to ensure that it is fair and not out of line with similar roles. The pay of the senior directors is reviewed annually by the Executive Director to ensure salaries are competitive, fair and commensurate with the role, experience and performance and external cost-of-living increases.

2.3. Risk management

The Trustees have implemented systems to be followed by Charity staff with a view of ensuring that the risks of financial loss are minimized. Trustees and Charity staff review the appropriateness of these procedures annually and ensure that they are being adhered to. The Trustees have also examined other operational and business risks that might arise and confirm that they have established systems to mitigate the significant risks. Over the course of the last year, the Trustees have considered the financial risks facing the Charity at every Trustees' meeting.

3. OBJECTIVES AND ACTIVITIES

The Partnering Initiative is a UK-based, globally-operating charity dedicated to driving effective cross-sector collaboration for a sustainable future.

3.1. TPI's vision and mission

TPI passionately believes in the power of collaboration across societal sectors to leverage complementary resources and unleash the innovation and scale necessary to achieve prosperous, sustainable business and societies. We are working to realize a world in which business, governments, NGOs, international organisations, communities and academia combine their resources through partnership at an unprecedented scale to maximize collective business and societal value and drive sustainable development.

TPI's ambitious mission is to drive the development of the enabling environment, the 'infrastructure' of support, the quality of collaboration, and the competencies necessary to scale up and mainstream effective partnerships for the SDGs globally.

3.2. TPI's charitable purpose

The charity is a charitable company limited by guarantee and was set up on 14th May 2013. It is governed by a memorandum and articles of association. TPI's mission is to drive widespread effective cross-sector collaboration for a sustainable future by:

1) Promoting sustainable development for the benefit of the public by:

- Raising awareness and promoting the use of cross-sector partnerships globally.
- Building systemic, institutional and individual capacity across all societal sectors to develop and support effective partnerships.
- Directly and indirectly supporting the development and effective delivery of cross-sector partnerships globally.
- Promoting and undertaking study and research in cross-sector partnerships and disseminating useful results of such study to the public at large.
- Supporting the development of an enabling architecture to drive the systematic use of cross-sector partnerships globally.

2) Advancing the education of the public in subjects relating to cross-sector partnerships globally.

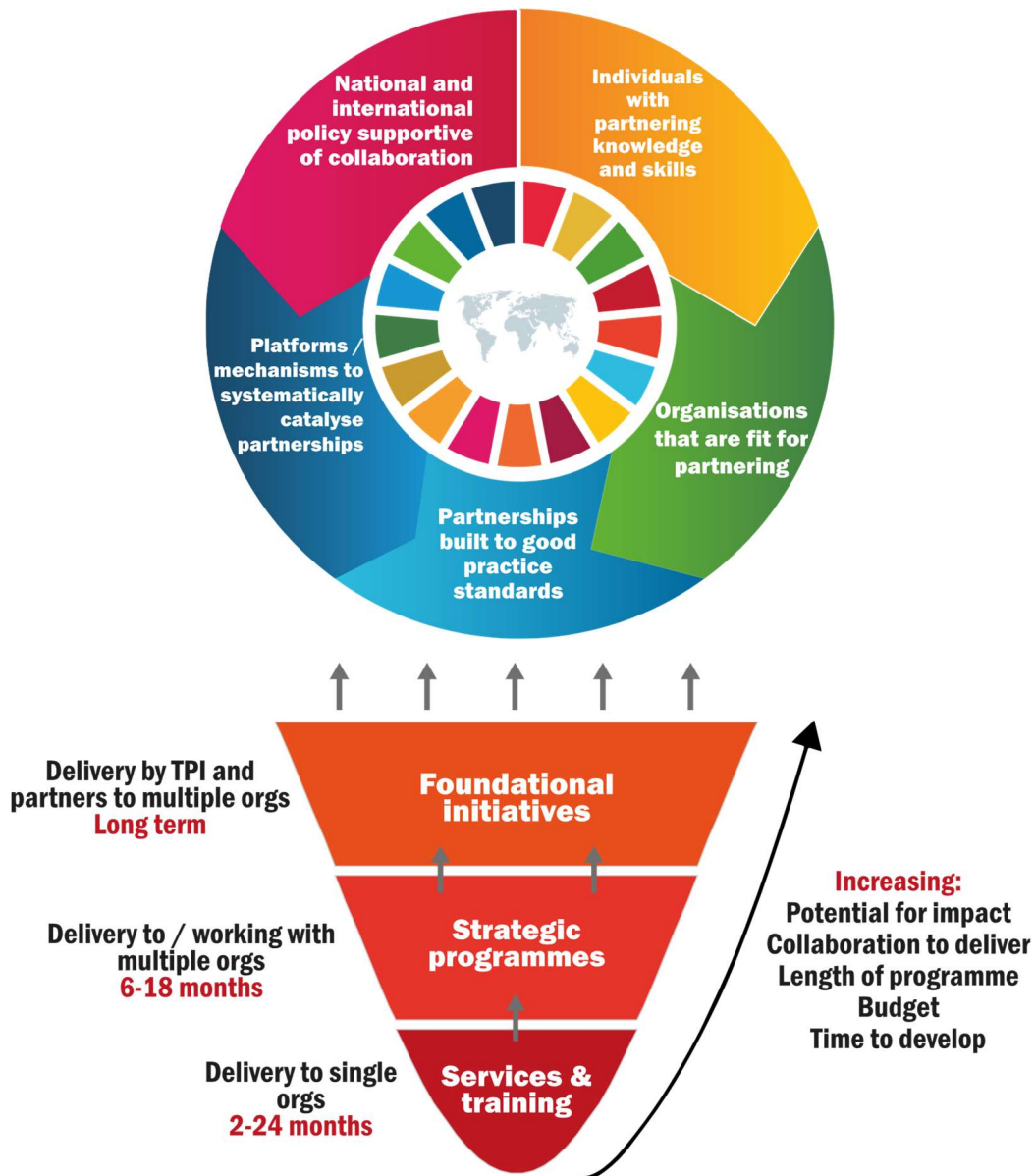
Note: Sustainable development is defined as "development which meets the needs of the present without compromising the ability of future generations to meet their own need"

Cross-sector collaboration or partnership is defined as "any combination of public, private, NGO, UN or other bodies working together to achieve common objectives which contribute to sustainable development."

4. DETAILS OF SIGNIFICANT ACTIVITIES FOR ACHIEVING OBJECTIVES

4.1. TPI's approach

TPI's cutting-edge, holistic approach aims to enable, at scale, five key 'building blocks' required to engage business in development and drive multi-stakeholder partnerships as an essential mechanism towards delivering the Sustainable Development Goals (SDGs).



TPI delivers its mission through a mixed portfolio: i) services and training to individual organisations; ii) strategic collaborative programmes which engage multiple organisations to collectively drive forward the state of the art of partnering in specific areas; iii) foundational initiatives – major programmes delivered collectively with other organisations to build an enabling eco-system that can deliver partnerships at scale.

4.2. Foundational initiative: Partnership Accelerator for the 2030 Agenda

The Partnership Accelerator for the 2030 Agenda is a major programme with the United Nations Department of Economic and Social Affairs (UN DESA), along with UN Office for Partnerships (UNOP), UN Global Compact and UN Development Coordination Office. The programme works in two areas:



**PARTNERSHIP
ACCELERATOR**
2030 AGENDA
FOR SUSTAINABLE DEVELOPMENT

- Partnership platforms: supporting effective country-driven multi-stakeholder partnership platforms and mechanisms that can engage business and other stakeholders and catalyse partnerships for the SDGs; drawing out best practices and guidance to assist optimizing emerging platforms; and supporting a new generation of UN Resident Coordinators and country teams.
- Partnership skills and competencies: building capacity of relevant stakeholders to develop and implement partnerships for the SDGs, and to support organisations to develop their policy and strategy, systems and processes, legal agreements, and culture to support collaboration.

Activities and achievements over the financial year included:

SIDS Partnership Symposium, Thailand

- The Partnership Accelerator developed and delivered two sessions at the UNESCAP Asia Pacific Forum on Sustainable Development in February 2024: a partnership dialogue and a policy dialogue.
- Symposium objectives included: gathering insights and perspectives from SIDS stakeholders on improving the SIDS Partnership Framework, exploring ways to enhance coalitions and partnerships on key SIDS priorities, and fostering peer learning and knowledge exchange among stakeholders to build effective collaborations for SIDS.
- Key priorities addressed during the Symposium included partnerships for science, technology, innovation, and digitalisation; partnerships for climate finance; and the role of higher education in driving sustainable development in SIDS. These priorities were identified based on the Praia (Cabo Verde) Declaration, which emphasized the need to strengthen the SIDS Partnership Framework and enhance collaboration in various sectors.

Development of briefing documents for SIDS partnerships

- TPI developed two briefs on: 1) Climate Finance Partnerships for SIDS; 2) Science Innovation and Technology Partnerships for SIDS.
- The briefs developed a typology of partnerships, gave examples of partnerships from SIDS around the world, and gave a set of recommendations to key stakeholders on how to most effectively scale up the partnerships for SIDS.

4th International Conference on SIDS, Antigua

- The Partnership Accelerator engaged in two side events at the 4th International Conference on SIDS, running two sessions: 1) Unlocking Opportunities for Blue and Green Economies (during the private sector forum); and 2) Partnerships in the new Decade of Action for SIDS (UN DESA and UN OHRLLS) during the main conference.
- Both standing-room-only events were dynamic, highly-interactive experiences that garnered a lot of attention and engagement. The key question running through both sessions was the key question for the Partnership Accelerator: 'what will it take to accelerate partnerships in SIDS'.

- The draft SIDS Partnership Framework was presented briefly in the private sector session and extensively in the main session. Considerable input was gained into the thinking for the new Framework, and the sessions contributed considerably to awareness of the new Framework and the work of the Partnership Accelerator.

Online training, St George's University, Grenada

- The Partnership Accelerator collaborated with Satesh Bidaisee, a graduate of the Accelerator's training-of-trainers program and faculty member at St. George's University in Grenada, to develop and deliver an online partnership training course.
- This course, attended by approximately 20 Caribbean participants, offered a comprehensive introduction to partnership development. The curriculum balanced partnership theory with practical insights from experienced speakers who shared their partnering experiences.
- The success of this initiative demonstrates how the training-of-trainers model effectively cascades partnership knowledge and skills to the country level.

4.3. Strategic programmes and research

Partnering for Philanthropic Impact

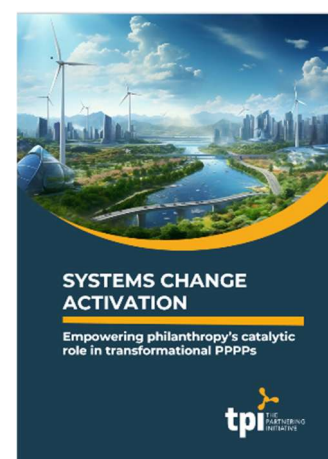
Partnering for Philanthropic Impact is a collaborative programme that brings together foundations from around the world to develop good practice, build sector knowledge and support foundations to deliver more transformational impact through multi-stakeholder, multi-sectoral partnerships.

In August 2024, TPI, supported by [Laudes Foundation](#) and in collaboration with [Philea](#), [WINGS](#), [African Venture Philanthropy Network \(AVPA\)](#) and [Asian Venture Philanthropy Network \(AVPN\)](#), launched a major survey to try to understand how philanthropy can better contribute to transformational change through multi-stakeholder partnerships. The report from this survey will be published in 2025.

PPPPs for People and Planet

Public-private-philanthropy partnerships (PPPPs) are a powerful type of multi-stakeholder collaboration, with the potential to bring about systemic change. Philanthropy can play critical, diverse roles in such partnerships, enabling them to address complex challenges such as energy transition, climate adaptation and mitigation, food security, health, and education.

In December 2023, TPI launched the report *[Systems change activation: the essential role of philanthropy to unleash the power of PPPPs](#)* at COP 28. Supported by Laudes Foundation and the [African Climate Foundation](#), and in association with the [World Association of Public-Private-Philanthropy Units & Professionals \(WAPPP\)](#), the report analysed 46 PPPPs to understand what they are able to achieve, the levers they apply to deliver transformation, and philanthropy's role in making them happen. The findings from the report were disseminated through 11 online and in person events, several of the online webinar recordings are available on our [website](#).



All examples analysed in our research were also collated into the '[PPPPs library](#)' - although not initially planned, this database of PPPP examples emerged organically from the landscape analysis and, when published, received very positive feedback about its usefulness from foundations, as well as from those looking to partner with foundations. The WINGS network and Philea have both expressed a desire to continue to add to the library and, in the case of WINGS, to create a permanent home. We also produced two in-depth case studies as separate publications after completing the landscape analysis.

With additional support from Laudes, TPI researched and prepared a [practitioner-focused case study](#) of the role that partnership has played in the Indian component of the Regenerative Landscape Production Collaborative (RPLC). The RPLC is a landscape-level public-private-people partnership (PPPP) operating in four countries that addresses multiple, interconnected issues within specific geographic areas.

The PPPP developed a partnership involving people who rely on the landscape for food, livelihoods, income, culture, and identity. It brings together public agencies and civil society organisations working in the landscape, along with businesses that source products such as organic cotton from agricultural systems. These systems, introduced by RPLC partners, conserve and enhance natural resources whilst building community resilience.

Laudes and its partners have commented on how useful the outputs from the case study have been, including as a central component of a recent national multi-stakeholder conference in Bangladesh.

Wellcome Trust

TPI serves as an 'Accompanying Partner' to the Wellcome Trust's 'Strategic Partnerships Team', helping them refine and operationalise both their partnering approach and their support offerings to the rest of the organisation.

This year, TPI has worked with partnership-focused teams to design monitoring and evaluation approaches and tools, as well as co-creating specific metrics for Equity, Diversity and Inclusion (EDI) within Wellcome's programmes and partnerships.

TPI has provided support to the Strategic Partnerships Team and other departments to develop their partnering capacity and approach through partnership roadmaps, plans, coaching, and tool development. Additionally, TPI has supported Wellcome in initiating and strengthening several key strategic global partnerships, for example by facilitating partnership vision workshops and creating partnership documents.

Global Forum for National SDG Advisory Bodies

TPI continued to act as secretariat for the [Global Forum](#), a network of national advisory bodies that promote national-level multi-stakeholder engagement in their government's planning, implementation and reporting of the UN Sustainable Development Goals (SDGs). The secretariat supports members and strategic partners and provides mechanisms and advice to help members engage with each other and share learning. Its role is also to grow the number of these organisations and encourage national governments to recognise their value.

Activities included:

- In January 2024, the Steering Group convened in Oxford to develop a new strategic direction. The strategic direction, including a new [Theory of Change](#), was subsequently presented to the Global Forum community during the April Community Call for feedback.
- In July 2024, TPI facilitated two events for Global Forum members at the High-Level Political Forum (HLPF) in New York. The first event [VNR Lab 10: Showcasing multi-stakeholder participation in a VNR - Country examples and a checklist for multi-stakeholder participation](#) involved Global Forum members from Ecuador, Jamaica and Kenya reporting on the factors that determine

whether the progress of the 2030 Agenda can be successfully and constructively monitored. The second event, *VNR country peer review processes and the experiences of Global Forum members* explored the Voluntary National Review (VNR) process in more depth. Learning notes from both these events are published on the Global Forum website.

- The Global Forum also advertised events organised by other members, such as a virtual side event to the 2024 United Nations Summit of the Future Action Days, *Integrating the SDGs and Delivering a Sustainable Future: 2030 and Beyond*.
- TPI also organised several fundraising meetings with a voluntary fundraising committee made up of Global Forum members to diversify funding options and thereby secure the future of the Global Forum.

4.4. Services and support

CGIAR Network strategy development and implementation

In 2024, TPI supported CGIAR to develop and implement a new strategy for the network. The project included the development of a roadmap and partnership stock take, and the development of the strategy itself, as well as implementation support including implementation planning, capacity building, institutional strengthening and MEL planning. In a subsequent phase of the project TPI is supporting CGIAR to pilot, socialise and test the strategy document.

Food and Agriculture Organisation (FAO)

TPI's previous work with FAO involved helping the organisation to define 'transformative partnerships' and developing a guidance note setting out how to deliver this form of collaboration in practice. This phase focused on socialisation of the guidance note. A major element of this work concerned the creation of an online, self-guided series of modules that took FAO colleagues through the aspects covered in the guidance note, including a visualisation of the partnership contribution to agrifood systems; the levers of change available through partnerships to create change in those systems; and the forms of added value created by those partnerships.

Two cohorts of staff were identified to receive further in-depth training following the completion of the online self-guided modules. These facilitated, interactive workshops enabled participants to contextualise and apply the materials from the guidance note in their specific programmes and spheres of operation. The workshops also provided a significant opportunity for colleagues who would not normally work together to engage with a shared language around the topic of transformative partnership. In addition, TPI moderated a webinar to share the transformative partnership guidance with FAO leadership.

Global Alliance for Drowning Preventions (GADP) strategy and governance

TPI worked with the members of the newly formed GADP to develop its operational framework, setting out the vision, mission, high-level approach, operating procedures and key areas of focus for its initial phase 2024-25. Designed primarily for members of the GADP, the framework also served to inform the wider drowning prevention community of the GADP's operations and plans.

Outlining a pragmatic approach to membership, governance and ways of working in the immediate term, whilst allowing space for an inclusive process to adapt and expand as the Alliance develops, the framework drew on best practices from other global partnerships and was built on desk review, interviews and the outputs of a GADP workshop in Perth and a later TPI facilitated workshop in London.

Islamic Development Bank

The Islamic Development Bank (IsDB) identified the need to increase both the number and quality of its partnerships to benefit its 57 Member Countries. IsDB approached TPI to support this effort by researching and preparing an insights report that specifically profiled 35 of IsDB's most relevant current partners, reviewed the mandate of the Partnerships Unit which IsDB had created to drive partnership forward in the Bank, and advised on processes and procedures to optimise IsDB partnering.

By developing an in-depth understanding of IsDB's partnering practice, the report provided an important baseline and essential material for IsDB's Partnership Approach, which TPI then also drafted at their request as an extension to the original work. This document, once adopted by senior management and the Board, will help to steer partnerships across the IsDB Group.

The report and partnership approach draw from global best practices, including those of TPI. The research methodology included a review and analysis of IsDB documents, desk research of websites and other published materials, and in-depth interviews with IsDB Group staff. Additional input came through confidential interviews with several of TPI's contacts and benchmarking against other development banks.

School Partnerships Alliance

The School Partnerships for Impact Guide, developed with the Schools Partnership Alliance in 2022, aimed to provide a common framework for, and best practice examples of effective and impactful cross-sector partnerships in the education sector. Building on that work, TPI supported SPA to develop a set of practical tools to support strategic partnering, designed for schools from all sectors to use when working collaboratively, to maximise the focus, value, and strategic impact of their partnerships.

United Nations Environment Programme (UNEP) Convention on Biological Diversity

United Nations Development Programme (UNDP) and UNEP, working closely with the CBD secretariat, run the 'Early Action Support' facility, supporting countries to develop their National Biodiversity Strategic Action Plans. With a new phase of the initiative to begin shortly, TPI undertook a light touch partnership health check to understand the areas where the collaboration was operating effectively, and areas where there were inefficiencies or challenges. A series of interviews and analysis led to report circulated in advance of a workshop in Montreal for all secretariat staff. The highly successful workshop built up the relationship and colleagues' collective understanding of effective collaboration, developed new ways of working and created new strategic frameworks and approaches focussing on the needs of the countries.

Urban Climate Finance Accelerator

TPI facilitated a two-day meeting in London, bringing together a range of climate focused, NGOs, networks and foundations such as Leading Urban Climate Action, the C40, Global Covenant of Mayors, Bloomberg Philanthropies, and Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ). The workshop helped the organisations further their collaboration on a new Urban Climate Finance Accelerator both in terms of strategy and the quality of the partnership.

UN Nutrition network health checks

TPI worked with UN Nutrition, a FAO hosted UN coordination mechanism for nutrition that includes 14 UN members and the Consortium of International Agricultural Research Centres (CGIAR), to carry out a Partnership Health Check and develop and action plan designed to maximise UN Nutrition's impact.

Based on an extensive online survey and interviews with UN Nutrition members, the Secretariat, Chair and Steering Committee, the Partnership Health Check examined the health and efficiency of UN Nutrition's setup, operation and processes and assessed the extent to which the essential building blocks of partnership were in place.

Based on the Health Check findings, TPI designed a two-day workshop to be held in November 2024 to build on areas of success and address challenges in order to maximise UN Nutrition's impact at global, regional and country levels.

World Health Organisation Eastern Mediterranean Regional Office (WHO EMRO) needs assessment

The Partnering Initiative (TPI) was contracted to carry out a needs assessment and develop recommendations to inform a wider programme of work focused on partnering capabilities within the WHO Eastern Mediterranean Region (WHO EMR). TPI's research focused on building a greater understanding of the strategic relevance and importance of partnerships to WHO EMR; WHO EMR's current partnership landscape, including priorities and gaps; and key challenges and barriers to WHO EMR partnering strategically and effectively to support its mission.

World Resources Institute Partnership Unit Support

In 2023, the World Resources Institute (WRI) established a new partnerships unit to leverage WRI's substantial collaborative legacy while expanding its vision to engage more diverse stakeholders for transformational impact. Building on foundational work from Phase 1 (June-September 2023), The Partnering Initiative (TPI) deepened its collaboration with WRI throughout October 2023-September 2024, executing the comprehensive "Fit for Partnering" assessment. During this period, TPI worked extensively with both the partnerships team and Global Executive Team to analyse existing partnership practices, facilitate consensus-building around WRI's strategic partnering vision, identify enablers and barriers to success, and determine critical organisational capability requirements. TPI's approach incorporated comparative analysis against partnership best practices from leading international organisations, providing valuable benchmarking to inform WRI's partnership roadmap development.

4.5. Open and tailored trainings

Open training

TPI continued to develop and deliver its flagship *Building Effective Partnerships for Development* open training course, aimed at individual partnership practitioners. The online training combines virtual group sessions with inter-module assignments, to be completed individually or in groups. These assignments are designed to provide space for both individual reflection and the opportunity to take the tools, frameworks and concepts covered in the sessions and apply them to their personal partnering context.

In 2023-24 TPI held two *Building Effective Partnerships for Development* courses, open to partnership practitioners from any global region or sector. The value of these online facilitated courses continues to be evident in the wide range of participants, allowing knowledge sharing among both practitioners with strong 'on the ground' experience and those with a more strategic outlook, leading to lively discussions and effective and interesting group work.

TPI also delivered a range of trainings on a variety of topics to individual organisations, including:

The Children's Investment Fund Foundation (CIFF)

TPI continued its work with CIFF, delivering the third in a series of training courses designed to support CIFF's new people strategy and leadership behaviour framework which include collaboration across the

organisation and strengthening external partnerships. This now *established Building Effective Relationships* course develops competencies to support effective relationships, both internally and in external partnerships. The course, tailored to CIFF's priorities, is based on seven modules including mapping collaborative landscapes, influencing with and without power, dealing with conflict and challenges, effective negotiation, facilitation skills, and an introduction to collaborative leadership.

World Health Organisation Eastern Mediterranean Regional Office (WHO EMRO)

Following the recommendations from the needs assessment, TPI worked with the WHO EMRO team to develop a tailored Creating & Managing Effective Partnerships course for two training cohorts from both the Regional and Country offices. Based on TPI's flagship *Building Effective Partnerships* course, the five training modules reflected both the outcomes of the needs assessment, a desk review of existing partnerships and partnership challenges and direct input from WHO EMRO staff and included the partnership fundamentals and the role of collaboration in WHO EMR's strategic objectives, the partnership relationship, negotiation and communication and managing partnerships & planning for the future. A follow-up in-person course in Cairo is planned for late 2024.

United Nations System Staff College (UNSSC)

TPI has been a partner with UNSSC since 2007, and we are delighted to provide the partnership sessions into a range of UNSSC courses. In 2023/24, courses included a UNSSC workshop with FAO, a webinar with UNAIDS on influencing and building multi-sectoral partnerships, and in-person training in Bonn around partnerships and resource mobilisation.

University of Oxford, Masters in Global Health Leadership

In September 2024, Executive Director, Darian Stibbe, led a partnerships workshop as part of the health policy module of the Oxford MSc in Global Health Leadership.

4.6. Outreach

COP 28

At COP 28, TPI launched its groundbreaking report *Systems change activation: the essential role of philanthropy to unleash the power of PPPPs*, developed with support from Laudes Foundation, the African Climate Fund, and in association with WAPPP.

TPI Executive Director, Darian Stibbe, spoke at the United Nations Framework Convention on Climate Change's (UNFCCC) Innovation hub at a high-level session on systems change and innovation for climate and sustainability action.

Cross Sector Social Interactions (CSSI) Symposium 2024: Power and Inclusion in Cross-Sector Social Interactions

In April 2023, TPI had the pleasure of co-hosting the biannual CSSI Symposium at the University of Cape Town Graduate School of Business, in collaboration with PRME Chapter Africa and the Embedding Project. Bringing together 130 participants from 30 countries, the symposium highlighted the challenges of engaging government in partnerships for sustainable development and explored cross-sector collaboration as a response to inequality and exclusion. For further insights, read our two blogs from the event:

- [Bridging the academic-practitioner divide: insights from CSSI 2024](#)
- [The critical role of government in partnerships for sustainable development](#)



Global policy influence through the Partnership Accelerator

Through the Partnership Accelerator, TPI contributed to several outreach events aimed at building global understanding of partnerships for sustainable development and highlighting the need to invest in both capabilities and enabling environments to make effective partnerships happen, including:

- SIDS Partnership Symposium, Bangkok, Thailand (February 2024)
- 4th International Conference on SIDS, Antigua (May 2024)
- Online Partnership Training, St George's University, Grenada

Multi-Stakeholder Advisory Group on the 2024 ECOSOC Partnership Forum

Darian Stibbe was appointed to the [Expert Group Meeting of the Multi-Stakeholder Advisory Group to the 2024 ECOSOC Partnership Forum](#) 2024, advising the ECOSOC president on the agenda for the meeting and supporting outreach.

PPPPs for People and Planet

TPI disseminated the findings from the [Systems change activation: the essential role of philanthropy to unleash the power of PPPPs](#) report at several in person events and webinars, including:

- Sneak preview: 'PPPPs for People and Planet' report in November 2023: 11 participants (closed online event)
- [Systems activation report findings launch event in November 2023: Empowering philanthropy's role in transformative PPPPs](#): 100 participants
- Event at COP28 in December 2023: Approximately 100 participants from foundations and venture philanthropy networks
- Session at Philea Forum in May 2024 with Laudes Foundation featuring #BuildingLife example: approx. 40 participants
- Fishbowl conversation on the catalytic role of foundations in Public-Private-Philanthropy Partnerships (PPPPs) at Swiss Foundations Forum in September 2024: 60+ foundation representatives as well as 3 corporate sector and 1 public sector representatives

UN Summit of the Future

In September 2024, Executive Director, Darian Stibbe represented TPI at the UN Summit of the Future 2024 in New York. Darian spoke on a panel "Earth vs. Space: What is collective humanity and pluralism?" at a side event from UNESCO IESALC and the Interstellar Foundation. Darian attended the launch of OECD netFWD's [Statement on Philanthropy's vision for the United Nations' Summit of the Future and beyond](#)", endorsing this groundbreaking statement on behalf of TPI. He also moderated a discussion at Business Fights Poverty's Global Goals Summit.

Virtual side event to the 2024 UN ECOSOC Forum

On the 30th of January 2024, TPI ran a virtual side event for the UN ECOSOC Forum in collaboration with Partnerships 2030, UN DESA and the Global Forum for National SDG Advisory Bodies entitled "Unite to Ignite: Accelerating the transformational power of partnerships for the SDGs and beyond."

The event concluded with a call to action from Darian Stibbe, urging participants to implement the report's findings and invest in partnership capacities to accelerate transformative partnerships for the SDGs and beyond.

4.7. Future plans

TPI will continue to provide services and training, build on existing programmes, and develop new major initiatives to scale up our impact.

2030 Agenda Partnership Accelerator

TPI's future plans as part of the Partnership Accelerator include undertaking a training for the Ugandan government and the UN Resident Coordinator's Office.

Global Forum for National SDG Advisory Bodies

TPI's plans for the Global Forum revolve largely around groundbreaking new research on the mechanisms for whole-of-society engagement. This research will assist Global Forum members, governments and other stakeholders to have more effective mechanisms for whole-of-society engagement. The aim is to support an expansion in the range and quality of engagement processes and provide practical guidance on how to select and implement the most effective mechanism for any particular development challenge. TPI will support this research by developing a learning framework, and by coordinating the Global Forum Regional Hubs, who will also be engaged in the research processes.

The report will also form a key part of the fundraising strategy that will secure the future of the Global Forum.

Partnering for Philanthropic Impact

TPI will continue to expand its work towards a step change within philanthropy, maximising its transformational impact through engaging in, and supporting, multi-stakeholder collaboration. It will do this through the development of a major new programme, TRANSFORM!

With the continued support of WINGS and Laudes Foundation, TPI will produce a philanthropy sector needs analysis report. The report will be the culmination of extensive research and consultations with over 50 foundations, providing valuable insights into current partnering practices, the challenges faced, and the future aspirations of the sector. The findings will highlight both the progress made and the significant opportunities for growth in embracing transformative partnerships. By identifying key barriers and offering actionable recommendations, the report will equip foundations with the knowledge of the internal investments in organisational change they may need to make to maximise their impact.

The next phase will involve the dissemination of the report and its research findings through our global partners (WAPPP, WINGS) and regional philanthropy associations (AVPA for Africa, AVPN for Asia, Latimpacto for Latin America and Philea for Europe) through virtual and in-person events such as ECOSOC 2025.

Additionally, TPI will use the philanthropy needs assessment report to develop a **Master Class for Foundations Series** that will equip foundations with the essential knowledge, skills and tools needed for effective partnership development and management.

TPI is expanding its knowledge of public-private-people partnerships (PPPPs) through light-touch research of additional landscape-level partnership examples. This work builds on the Regenerative Landscape Production Collaborative (RPLC) case study prepared last year. The initiative includes disseminating the case study at various virtual and in-person events, with dual aims: to inspire other foundations to consider funding similar PPPP models and to help Laudes attract funders interested in building upon their work.

Open training

TPI will continue to facilitate its flagship Building Effective Partnerships for Development open training course for individual partnership practitioners, and aims to re-introduce in-person courses, hosted in the Global South, in addition to continuing facilitated online learning.

TPI also intends to build on its current open training options, utilising TPI's extensive programmatic experience, thought leadership and materials developed for tailored training courses to focus on partnering with specific sectors. Initially this programme will focus on partnering with business.

5. ADMINISTRATION

5.1. Public benefit

The Trustees have complied with their duty to have due regard to the guidance on public benefit published by the Charity Commission in exercising their powers and duties.

5.2. Financial review

The results of the charity for the year can be seen on page 23.

Income for the year increased slightly at £898,497 compared with £895,105 from the previous year. The net movement of funds was a positive £44,717, leaving total funds at £409,473 for the year. Of this, £6,647 is restricted, and £60,000 has been designated to the philanthropy programme and the communications function in the next financial year, leaving free reserves at the end of the year at a healthy £342,826.

5.3. Reserves policy

The Partnering Initiative aims to maintain in reserve six months' worth of operating costs (approximately £300k), along with a development budget for creating new cutting-edge programmes or investing in the organisation. As of 30th September 2024, free reserves held were £342,826, which the Trustees deem acceptable.

6. STATEMENT OF TRUSTEES' RESPONSIBILITIES

The Trustees (who are also directors of The Partnering Initiative for the purposes of company law) are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the Trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for the year. In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP 2019 (FRS 102);
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The Trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- there is no relevant audit information of which the charitable company's auditor is unaware; and
- the Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditor is aware of that information.

The Trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

This report has been prepared having taken advantage of the small companies' exemption in the Companies Act 2006.

This report was approved by the Board, 23rd June 2025.



Katherine Hartley
Chair of Trustees

7. INDEPENDENT AUDITORS' REPORT TO THE MEMBERS OF THE PARTNERING INITIATIVE

7.1. Opinion

We have audited the financial statements of The Partnering Initiative (the 'charitable company') for the year ended 30th September 2024 which comprise the Statement of Financial Activities, the Balance Sheet, the Cash Flow Statement, and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 30th September 2024, and of its incoming resources and application of resources, including its income and expenditure (including income from the United Nations and related expenditure), for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

7.2. Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

7.3. Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

7.4. Other information

The trustees are responsible for the other information. The other information comprises the information included in the trustees' annual report, other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

7.5. Opinions on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

- the information given in the trustees' report (incorporating the directors' report) for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the directors' report has been prepared in accordance with applicable legal requirements.

7.6. Matters on which we are required to report by exception

In the light of our knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept, or returns adequate for our audit have not been received from branches not visited by us; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of directors' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit; or
- the trustees were not entitled to prepare the financial statements in accordance with the small companies' regime and take advantage of the small companies' exemptions in preparing the directors' report and from the requirement to prepare a strategic report.

7.7. Responsibilities of trustees

As explained more fully in the trustees' responsibilities statement set out on page 18, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

7.8. Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The specific procedures for this engagement and the extent to which these are capable of detecting irregularities, including fraud are detailed below:

- Enquiry of management and those charged with governance around actual and potential litigation and claims;
- Enquiry of management and those charged with governance to identify any instances of non-compliance with laws and regulations;
- Reviewing minutes of meetings of those charged with governance;
- Reviewing financial statement disclosures and testing to supporting documentation to assess compliance with applicable laws and regulations;
- Performing audit work over the risk of management override of controls, including testing of journal entries and other adjustments for appropriateness, evaluating the business rationale of significant transactions outside the normal course of business and reviewing accounting estimates for bias.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

7.9. Use of our report

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.



Benjamin Hayes BSc FCA (Senior Statutory Auditor)

23rd June 2025

For and on behalf of Wenn Townsend Chartered Accountants, Statutory Auditor

30 St Giles
Oxford
OX1 3LE

8. FINANCIAL STATEMENTS

8.1. Statement of Financial Activities (including Income and Expenditure Account) for the period ended 30th September 2024

		Unrestricted funds 2024 (£)	Restricted funds 2024 (£)	Total funds 2024 (£)	Unrestricted funds 2023 (£)	Restricted funds 2023 (£)	Total funds 2023 (£)
Income from:	Note						
Charitable activities	2	642,272	256,225	898,497	717,738	177,367	895,105
Total income		642,272	256,225	898,497	717,738	177,367	895,105
Expenditure on:							
Charitable activities	3	604,202	249,578	853,780	697,679	177,367	875,046
Total expenditure		604,202	249,578	853,780	697,679	177,367	875,046
Net income for the year		38,070	6,647	44,717	20,059	-	20,059
Transfers between funds		-	-	-	-	-	-
Net movement in funds	8	38,070	6,647	44,717	20,059	-	20,059
Balances b/f at 1 st October 2023		364,756	-	364,756	344,697	-	344,697
Balances c/f at 30 th September 2024		402,826	6,647	409,473	364,756	-	364,756

All income and expenditure derive from continuing activities. The statement of financial activities includes all gains and losses recognised during the year.

The notes, section 8.5, page 26, form part of the financial statements.

8.2. Balance Sheet as at 30th September 2024

	Notes	2024	2023
		£	£
Current assets			
Debtors	6	194,788	429,084
Cash at bank and in hand		321,693	41,377
		<u>516,481</u>	<u>470,461</u>
Creditors: falling due within one year	7	(107,008)	(105,705)
		<u>409,473</u>	<u>364,756</u>
Net current assets			
		<u>409,473</u>	<u>364,756</u>
Net assets		<u>409,473</u>	<u>364,756</u>
Funds:			
Restricted funds	8	6,647	-
Unrestricted funds	8		
General funds		342,826	364,756
Designated funds		60,000	-
		<u>402,826</u>	<u>364,756</u>
Total unrestricted funds		<u>402,826</u>	<u>364,756</u>
Total funds		<u>409,473</u>	<u>364,756</u>

8.3. Board approval

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime. The financial statements were approved and authorised for issue by the trustees on **23rd June 2025** and signed on their behalf by:



Marta Garcia
Treasurer

The notes, section 8.5, page 26, form part of the financial statements.

8.4. Statement of cash flows for the year ended 30th September 2024

	2024 £	2023 £
Reconciliation of net income to net cash flow from operating activities		
Net income for year	44,717	20,059
Decrease / (increase) in debtors	234,296	(50,878)
Increase / (decrease) in creditors	1,303	(23,457)
Net cash flow from operating activities	<u>280,316</u>	<u>(54,276)</u>
 Net increase / (decrease) in cash and cash equivalents	 <u>280,316</u>	 <u>(54,276)</u>
Cash and cash equivalents at 1st October 2023	<u>41,377</u>	<u>95,653</u>
Cash and cash equivalents at 30th September 2024	<u>321,693</u>	<u>41,377</u>

The notes, section 8.5, page 26, form part of the financial statements.

8.5. Notes forming part of the financial statements for the period ended 30th September 2024

1. Summary of significant accounting policies

a) General information and basis of preparation

The Partnering Initiative is a charitable company limited by guarantee and is incorporated in England. In the event of the charity being wound up, the liability in respect of the guarantee is limited to £10 per member of the charity. The address of the registered office is given in the charity information in these financial statements. The nature of the charity's operations and principal activities are detailed in the Trustees' Report.

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on a going concern basis under the historical cost convention modified to include certain items at fair value. The financial statements are prepared in sterling which is the functional currency of the charity. Monetary amounts in these financial statements are rounded to the nearest pound sterling.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

b) Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

Designated funds comprise funds set aside by the Board of Directors out of unrestricted funds for specific future purposes or projects.

Restricted funds comprise grants and donations subject to conditions imposed by the donor.

c) Income recognition

All income is included in the Statement of Financial Activities (SoFA) when the charity is legally entitled to the income after any performance conditions have been met, the amount can be measured reliably and it is probable that the income will be received.

Income from grants are recognised at fair value when the charity has entitlement after any performance conditions have been met, it is probable that the income will be received and the amount can be measured reliably. If entitlement is not met then these amounts are deferred.

Project grants and service contract fees are included as income where any work involved has been undertaken by the period end date. Any income received in advance is deferred until associated costs are incurred and based on the level of completion of the project.

Gifts in kind donated for distribution are included at valuation and recognised as income when they are distributed to the projects. Gifts donated for resale are included as income when they

are sold. Donated facilities are included at the value to the charity where this can be quantified and a third party is bearing the cost. No amounts are included in the financial statements for services donated by volunteers.

d) Expenditure recognition

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure is recognized where there is a legal or constructive obligation to make payments to third parties, it is probable that the settlement will be required and the amount of the obligation can be measured reliably

Irrecoverable VAT is charged as an expense against the activity for which expenditure arose.

Fund-raising costs are those incurred in seeking voluntary contributions and do not include the costs of disseminating information in support of the charitable activities. Support costs are those costs incurred directly in support of expenditure on the objects of the charity and include project management. Governance costs are those incurred in connection with administration of the charity and compliance with constitutional and statutory requirements.

e) Foreign currencies

Foreign currency transactions are initially recognised by applying to the foreign currency amount the spot exchange rate between the functional currency and the foreign currency at the date of the transaction.

Monetary assets and liabilities denominated in a foreign currency at the balance sheet date are translated using the closing rate.

f) Employee benefits

When employees have rendered service to the charity, short-term employee benefits to which the employees are entitled are recognised at the undiscounted amount expected to be paid in exchange for that service.

The charity operates a defined contribution plan for the benefit of its employees. Contributions are expensed as they become payable.

g) Debtors and creditors receivable/payable within one year

Debtors and creditors with no stated interest rate and receivable or payable within one year are recorded at transaction price. Any losses arising from impairment are recognised in expenditure.

h) Tax

The charity is an exempt charity within the meaning of Schedule 3 of the Charities Act 2011 and is considered to pass the tests set out in Paragraph 1 Schedule 6 Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes.

i) Going concern

The financial statements have been prepared on a going concern basis as the trustees believe that no material uncertainties exist. The trustees have considered the level of funds held and the expected level of income and expenditure for 12 months from authorising these financial statements. The budgeted income and expenditure is sufficient with the level of reserves for the charity to be able to continue as a going concern.

2. Income from charitable activities

	2024	2023
	£	£
Service contract fees	426,942	342,401
Programmes	244,405	420,422
Training courses	130,121	123,019
Grants	95,830	8,484
Other income	1,199	779
	898,497	895,105

3. Charitable activities

	Direct charitable costs £	Indirect charitable costs £		Total 2024 £	Total 2023 £
		Core organisational*	Governance		
Consultancy	239,728	6,946	-	246,674	221,216
Wages and salaries	276,216	152,052	21,539	449,807	525,855
Grants	17,248	-	-	17,248	8,559
Venue hire	1,105	-	-	1,105	7,846
Travel & accommodation	38,275	7,298	-	45,573	36,491
Rent and rates	-	27,782	-	27,782	26,317
Website & IT costs	2,101	4,742	-	6,843	9,012
Marketing, postage & stationery	756	1,094	-	1,850	7,809
Telephone	-	999	-	999	1,160
Bank charges	-	2,632	-	2,632	3,281
Insurance	-	766	247	1,013	839
General expenses	5,977	10,198	34	16,209	12,584
Audit fees	-	-	5,600	5,600	3,900
Bad debt expense	-	4,000	-	4,000	-
Foreign exchange (gains)/losses	15,669	9,519	1,257	26,445	13,177
	597,075	228,028	28,677	853,780	875,046

*Core organisational costs include all non-programme-attributable costs including administration, policy engagement, new programme research and development, unfunded knowledge product generation, communication and dissemination.

4. Trustees' and key management personnel remuneration and expenses

During the year, no Trustees received any remuneration or other benefits (2023: £nil).

During the year, no expenses were reimbursed to Trustees (2023; £102 to one Trustee).

The total amount of employee benefits received by key management personnel was £207,351 (2023: £232,932). The Trustees consider the charity's key management personnel comprise the Board of Trustees, the Chief Executive, and the senior management team.

5. Staff costs

	2024	2023
	£	£
Wages and salaries	315,146	395,051
Social security costs	28,416	38,604
Pension costs	106,245	92,200
	449,807	525,855

The number of employees whose emoluments as defined for taxation purposes amounted to over £60,000 in the year was as follows:

	2024	2023
Number	Number	
£80,001 - £90,000	-	1
£90,001 - £100,000	1	-

The average number of employees, calculated on a full-time equivalent basis, analysed by function was:

	2024	2023
	Number	Number
Charitable activities	6.5	8
Management and administration of the charity	1.5	2
	8	10

6. Debtors

	2024	2023
	£	£
Grants and fees receivable	194,769	127,524
Prepayments and accrued income	-	301,541
Other debtors	19	19
	194,788	429,084

7. Creditors: amounts falling due within one year

	2024 £	2023 £
Trade creditors	19,353	19,958
Accruals and deferred income	37,275	57,453
Other tax and social security	23,352	19,666
Other creditors	27,028	8,628
	107,008	105,705

8. Funds

	At 1 st October 2023 £	Income £	Expenditure £	Transfers £	At 30 th September 2024 £
<u>Restricted funds</u>					
Global Forum (GIZ)	-	112,372	(112,372)	-	-
PPPP	-	96,025	(96,025)	-	-
CSSI	-	21,700	(21,700)	-	-
Laudes Foundation – Wellbeing	-	8,421	(1,774)	-	6,647
CITES	-	17,707	(17,707)	-	-
Total restricted funds	-	256,225	(249,578)	-	6,647
<u>Unrestricted funds</u>					
<u>Designated funds</u>					
Individual personal donation	-	100,000	-	(40,000)	60,000
PPPP	-	-	(36,000)	36,000	-
Total designated funds	-	100,000	(36,000)	(4,000)	60,000
General funds	364,756	542,272	(568,202)	4,000	342,826
Total unrestricted funds	364,756	642,272	(604,202)	-	402,826
Total funds	364,756	898,497	(853,780)	-	409,473

Global Forum (GIZ)

Secretariat services for the Global Forum for National SDG Advisory Bodies.

PPPP

Public Private Philanthropy Partnership research programme. The restricted fund relates to grants from Laudes Foundation and the African Climate Foundation awarded to the programme.

The designated fund relates to TPI's designation of funds from an individual personal donation to support the programme.

CSSI

Funding to support the hosting of the Cross-sector Social Interactions conference (Cape Town, April 2024), and travel bursaries for a number of participants.

Laudes Foundation – Wellbeing

A grant from Laudes Foundation towards staff wellbeing.

CITES

Support services.

Individual personal donation

Donation made anonymously via CAF. This donation was designated by management, in consultation with the Trustees, to support the development of a new programme on philanthropy and TPI's new communications' position. During the year, £36,000 was transferred to the PPPP restricted fund and £4,000 was transferred to TPI core costs (communication).

9. Related parties

There were no related party transactions in the current or preceding year.



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Charity number: 1154259

THE PARTNERING INITIATIVE

England & Wales - Charity number 1154259

Accounts



THE PARTNERING INITIATIVE

Trustees' Annual Report and Accounts 2022-23

England & Wales Company Registration: 8528402

Charity Commission Number: 1164259

Address: 21b Park End Street, Oxford, OX1 1HU, United Kingdom

TRUSTEES' ANNUAL REPORT

1st October 2022 - 30th September 2023

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1. LEGAL AND ADMINISTRATIVE INFORMATION

1.1. Trustees

James Cole
Sean De Cleene (resigned 15th June 2023)
Marta Garcia (Treasurer)
Thomas Hale

Katherine Hartley (Chair)
Marianne Mwaniki
Caron Rohsler
Elizabeth Stuart

1.2. Chief Executive

Dr Darian Stibbe

1.3. Registered Office

21B Park End Street
 Oxford OX1 1HU
 United Kingdom

1.4. Auditors

Wenn Townsend
 30 St Giles
 Oxford, OX1 3LE, United Kingdom

1.5. Bankers

Metro Bank
 4-5 Queen Street, Oxford, OX1 1EJ, United Kingdom

The trustees, who are also directors of the charity for the purposes of the Companies Act, submit their annual report and the audited financial statements for the year ended 30th September 2023. The trustees have adopted the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities" (FRS 102) in preparing the annual report and financial statements of the charity.

2. STRUCTURE, GOVERNANCE AND MANAGEMENT

The charity is a charitable company limited by guarantee, set up on 14th May 2013. It is governed by a memorandum and articles of association.

2.1. Organisational structure

The Partnering Initiative operates out of a central hub in the UK with a core staff working on programme development and delivery, partner relations and communication. Our development projects, action research, strategic consultancy support and training services are delivered internationally through both core staff and a global network of highly experienced Associates. A key feature of all The Partnering Initiative's activities is the drawing out of cutting-edge knowledge on the theory and practice of partnership which is then disseminated widely through online knowledge exchange and webinars, guidebooks, reports and other publications.

The Partnering Initiative is run by an Executive Director reporting to a multi-sector independent Board.

2.2. Key management personnel remuneration

The Trustees consider the Board of Trustees and the senior management team of the Executive Director plus two senior directors as comprising the key management personnel of the charity in charge of directing and controlling the charity and running and operating the charity on a day-to-day basis. All Trustees give their time freely and no Trustee remuneration was paid in the year. Details of Trustee expenses and related party transactions are disclosed in note 4 to the accounts.

Trustees are required to disclose all relevant interests and, in accordance with policy, withdraw from decisions where a conflict of interest arises.

The pay of the Executive Director is reviewed annually by the Trustees to ensure it is commensurate with experience and performance and fair in comparison with similar roles. The pay of the senior directors is reviewed annually by the Executive Director to ensure salaries are competitive, fair and commensurate with the role, experience and performance and external cost-of-living increases.

2.3. Risk management

The Trustees have implemented systems to be followed by Charity staff to ensure the risks of financial loss are minimised. Trustees and Charity staff review the appropriateness of these procedures annually and ensure that they are being adhered to. The Trustees have also examined other operational and business risks that might arise and confirmed that they have established systems to mitigate the significant risks. Over the course of the last year, the Trustees have considered any financial or other risks facing the Charity at every Trustees' meeting.

3. OBJECTIVES AND ACTIVITIES

The Partnering Initiative is a UK-based, globally-operating charity dedicated to **driving effective multi-sector collaboration for a sustainable future.**

3.1. TPI's vision and mission

TPI passionately believes in the power of collaboration across societal sectors to leverage complementary resources and unleash the innovation necessary to achieve prosperous, sustainable business and societies. We are working to realize a world in which business, governments, NGOs, international organisations, communities and academia combine their resources through partnership at an unprecedented scale to maximize collective business and societal value and drive sustainable development.

TPI's ambitious mission is to professionalize collaboration and drive the development of the enabling environment: the 'infrastructure' of support, the quality of collaboration, and the institutional optimization necessary to scale up and mainstream effective partnerships for the Sustainable Development Goals (SDGs) globally.

3.2. TPI's charitable purpose

The charity is a charitable company limited by guarantee and was set up on 14th May 2013. It is governed by a memorandum and articles of association. TPI's mission is to drive widespread effective cross-sector collaboration for a sustainable future by:

1) Promoting sustainable development for the benefit of the public by:

- Raising awareness and promoting the use of cross-sector partnerships globally.
- Building systemic, institutional and individual capacity across all societal sectors to develop and support effective partnerships.
- Directly and indirectly supporting the development and effective delivery of cross-sector partnerships globally.
- Promoting and undertaking study and research in cross-sector partnerships and disseminating useful results of such study to the public at large.
- Supporting the development of an enabling architecture to drive the systematic use of cross-sector partnerships globally.

2) Advancing the education of the public in subjects relating to cross-sector partnerships globally.

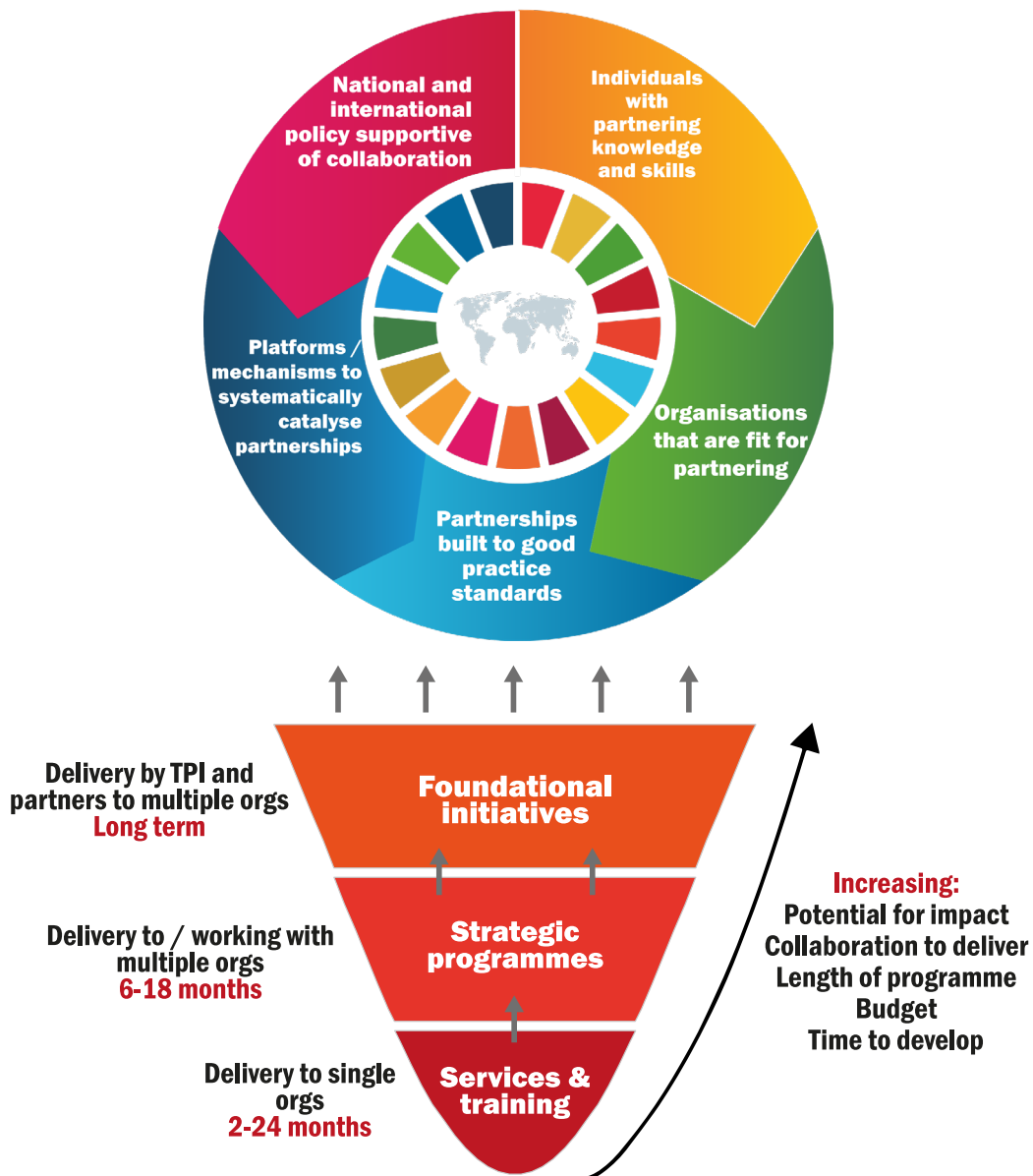
Note: Sustainable development is defined as "development which meets the needs of the present without compromising the ability of future generations to meet their own need"

Cross-sector collaboration or partnership is defined as "any combination of public, private, NGO, UN or other bodies working together to achieve common objectives which contribute to sustainable development."

4. DETAILS OF SIGNIFICANT ACTIVITIES FOR ACHIEVING OBJECTIVES

4.1. TPI's approach

TPI's cutting-edge, holistic approach aims to enable, at scale, five key 'building blocks' required to engage business in development and drive multi-stakeholder partnerships as an essential mechanism towards delivering the Sustainable Development Goals (SDGs).



TPI delivers its mission through a mixed portfolio: i) services and training to individual organisations; ii) strategic collaborative programmes which engage multiple organisations to collectively drive forward the state of the art of partnering in specific areas; iii) foundational initiatives – major programmes delivered collectively with other organisations to build an enabling eco-system that can deliver partnerships at scale.

4.2. Foundational initiative: Partnership Accelerator for the 2030 Agenda

The Partnership Accelerator for the 2030 Agenda is a major programme with the United Nations Department of Economic and Social Affairs (UN DESA), along with UN Office for Partnerships (UNOP), UN Global Compact and UN Development Coordination Office. The programme works in two areas:



**PARTNERSHIP
ACCELERATOR
2030 AGENDA**
FOR SUSTAINABLE DEVELOPMENT

- Partnership platforms: supporting effective country-driven multi-stakeholder partnership platforms and mechanisms that can engage business and other stakeholders and catalyse partnerships for the SDGs; drawing out best practices and guidance to assist optimizing emerging platforms; and supporting a new generation of UN Resident Coordinators and country teams.
- Partnership skills and competencies: building capacity of relevant stakeholders to develop and implement partnerships for the SDGs, and to support organisations to develop their policy and strategy, systems and processes, legal agreements, and culture to support collaboration.

Activities and achievements over the financial year included:

Sri Lanka Partnerships Week to support implementation of the United Nations Sustainable Development Cooperation Framework in Sri Lanka through effective partnerships. The week included:

- **The Sri Lanka Partnerships Forum**, attended by the Minister for Finance, convened high-level representatives from business, the UN, civil society and the public sector to inspire multi-stakeholder collaborative action towards Sri Lanka's development priorities, and plot out a roadmap for more systematic all-of-society collaboration;
- **A partnering training / development hybrid workshop**, on natural resource management, climate resilience and environmental sustainability, brought together all societal sectors, building skills and competencies for collaboration while brainstorming ideas for new partnerships in Sri Lanka;
- **A training-of-trainers** of UN staff responsible for the six results groups of the Cooperation Framework. The training built colleagues' capacities to run their own partnership trainings in the future (including a training run two months' later by the UN Resident Coordinators Office's partnership lead).

Mexico: Supported the development of the partnership platform, Building Alliances for Innovation and Sustainable Territorial Development, as a follow-up to the 2022 Mexico Partnership Forum.

Mauritius and Moldova: Provided support to the development of national partnership landscape assessments in Mauritius and Moldova.

Asia-Pacific: Undertook a training and training-of-trainers of a network of 'partnership accelerators' to advance and cascade partnership knowledge in Small Island Developing States.

4.3. Strategic programmes and research

Partnering for Philanthropic Impact

TPI's collaborative programme brings together foundations from around the world to develop good practice, build sector knowledge and support foundations to deliver more transformational impact through multi-stakeholder, multi-sectoral partnerships.

Porticus: Better Together? A study on the added value of collaboration in Porticus programmes

TPI conducted a high-level analysis of 14 Porticus programmes, investigating how funders can most effectively support impactful and transformational collaboration. The report identified four specific enablers of successful collaboration funded by philanthropy. These key enablers are linked to the important role of Programme Managers and Learning Partners; the need for thoughtful, iterative design for collaboration; allocation of dedicated resources to support the operational requirements of collaboration; and supportive institutional strategy and processes for programme approvals.

The report also identified the critical importance of strong partnership Monitoring, Evaluation, and Learning (MEL) approaches, highlighting the specific ways in which MEL could be further developed to support and measure successful collaboration.



Templeton World Charity Foundation (TWCF)

TPI worked closely with TWCF, designing and facilitating a workshop for major philanthropic research funders, to explore the concept of Collaborative Regional Research Hubs. The workshop involved exchanging experiences of foundations funding universities and research centres in low-income countries and collectively explored areas of potential future collaboration.

Wellcome

TPI is an 'Accompanying Partner' to the Wellcome Trust 'Strategic Partnerships Team', helping them to refine and operationalize the partnering approach of the team, as well as their support offer to the rest of the organisation. The initial phase involved creating a roadmap for how to strengthen Wellcome Trust's partnering capacity/approach, followed up with specific work to develop a partnership typology, M&E framework/tools, partner selection process, and a 'Partnership Practice Group'.

PPPPs for People and Planet

Public-private-philanthropy partnerships (PPPPs) are a powerful type of multi-stakeholder collaboration, with the potential to bring about systemic change. Philanthropy can play critical, diverse roles in such partnerships, enabling them to address complex challenges such as energy transition, climate adaptation and mitigation, food security, health, and education.

In 2023, TPI launched its programme with the World Association of Public Private Partnership Practitioners (WAPPP), [PPPPs for People and Planet](#), supported by Laudes Foundation and the African Climate Foundation. The programme aims to develop and accelerate good practice for philanthropy to help drive transformative PPPPs through research, knowledge sharing and exchange, community building, and directly supporting PPPPs.

During the first phase of the programme, TPI undertook research looking at 46 PPPPs around the world to understand the impact they are having, the levers of change being utilised and the critical role of Philanthropy in injecting the 'activation energy' that makes them happen.

Unite to Ignite international campaign

The Partnering Initiative, UN DESA, [Partnerships2030](#) (GIZ) and the [Global Forum for National SDG Advisory Bodies](#) undertook a joint campaign over the course of 2023 aimed at raising awareness and

challenging governments, funders and other stakeholders to invest in the critical enabling factors supporting the development, optimization and scale-up of multi-stakeholder partnerships in support of the SDGs and beyond.

The campaign included a major research programme looking at the state of partnership enabling factors around the world, and asked what is required for multi-stakeholder collaboration to thrive. The research included a global survey, desk research and interviews with partnership practitioners around the world. The insights were supplemented by side events at the ECOSOC Partnership Forum, the 2023 High-Level Political Forum on Sustainable Development, the 10th Asia-Pacific Forum on Sustainable Development, the 2023 Regional Forum on Sustainable Development in the ECE region, and the 2023 SDG Summit.

The campaign culminated in a Partnership Symposium held in the margins of the SDG Summit in September 2023 where the final report, [Unite to Ignite: Accelerating the Transformational Power of Partnership for the SDGs and Beyond](#), was launched. The results were fascinating, demonstrating for the first time the critical need for professional partnering competencies, neutral facilitation support, and organisations to become institutionally 'fit for partnering'. It also showed how current funding modalities are not supportive of partnerships. The report identifies the necessary actions and investments governments, partnerships, funders, organisations of all kinds need to take to ignite a new, systematic wave of transformational collaboration.



Global Forum for National SDG Advisory Bodies

TPI continued to act as secretariat for the Global Forum, a network of national advisory bodies that promote national-level multi-stakeholder engagement in their government's planning, implementation and reporting of the UN Sustainable Development Goals (SDGs). The secretariat supports members and strategic partners and provides mechanisms and advice to help members engage with each other and share learning. Its role is also to grow the network and encourage national governments to recognise the value of members' activities and advice.

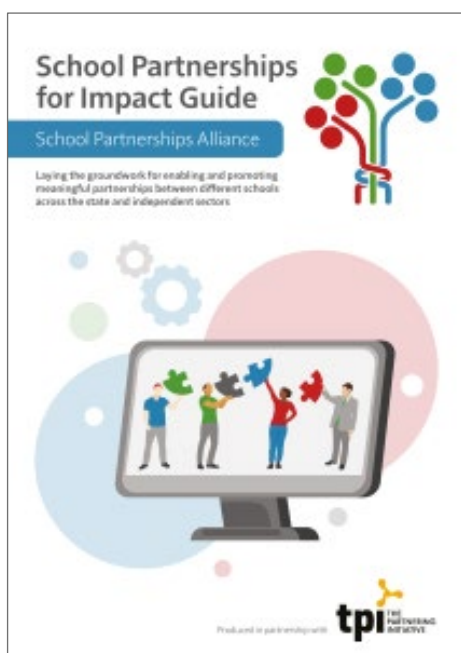
In the last year, the Global Forum has been able to fulfil its roles in two ways. Firstly, its activities have increased advisory bodies' knowledge of good practice in progressing their mandates, and on how to operate efficiently. Secondly, the profile of advisory bodies has been built up, to help ensure their role, and its importance, are more visible to governments.

Activities included:

- TPI facilitated two communities of practice: 1) Using Voluntary Local Reviews (VLRs) to drive localization of the SDGs and inform Voluntary National Reviews (VNRs), and 2) Leave No One Behind (with a focus on youth). The communities of practice provided opportunities for peer to peer sharing of experiences and learning about how best to support national governments and processes in working towards the SDGs.
- Two knowledge documents have been produced based on multiple exchanges between members. These are a guide to 'How to use multi-stakeholder advisory bodies to support an inclusive approach to VNRs and VLRs' (July 2023) and a checklist on 'How national governments can promote partnerships' (September 2023).

- The Global Forum also invited individual members to contribute at learning events, such as an SDG learning, training and practice session arranged by the campaign partners in New York (July 2023), an ECOSOC partnership event (January 2023), a VNR Lab at the HLPF (July 2023), and a side event in the UN as part of the SDG Summit action weekend (September 2023).
- The [Global Forum website](#), launched in June 2023, provides an accessible platform for all the accumulated knowledge from the network, including its flagship reports, guidance notes and information about its news and events. The new website is a showcase for Global Forum members and their achievements. It currently features profiles of 27 members.

School Partnerships for Impact



The [School Partnerships Alliance](#) (S.P.A.) was formed to build on the many formal and informal partnerships across state and independent schools, and work closely with schools to encourage collaboration and promote best partnering practice.

Commissioned by S.P.A., TPI undertook a research study and developed the School Partnerships for Impact Guide, which provides a common framework for collaboration, and serves as a call-to-arms for head teachers and administrators on the value and impact which can be created through effective partnering.

The findings revealed strong evidence of effective cross-sector school partnering across England and Wales, with almost all built on strong relationships and recognition of individual and collective needs and shared goals. The study noted there is tremendous potential to build on existing experience to create professional standards around partnering for the whole education sector.

TPI and the School Partnership Alliance (S.P.A.) launched the School Partnerships for Impact Guide on 24th January 2023, at the House of Lords.

Since publishing the report, TPI has worked closely with S.P.A. to develop a set of partnering tools to specifically support partnerships within the education sector, in particular between state and private schools, as well as other partners.

4.4. Services and support

Food and Agriculture Organisation (FAO)

TPI's previous work with FAO involved helping the organisation to define 'transformative partnerships' and developing a guidance note setting out how to deliver this form of collaboration in practice.

This phase focused on socialisation of the guidance note. A major element of this work concerned the creation of an online, self-guided series of modules that took FAO colleagues through the aspects covered in the guidance note, including a visualisation of the partnership contribution to agrifood systems; the levers of change available through partnerships to create change in those systems; and the forms of added value created by those partnerships.

Two cohorts of staff were identified to receive further in-depth training following the completion of the online self-guided modules. These facilitated, interactive workshops enabled participants to contextualise and apply the materials from the guidance note in their specific programmes and

spheres of operation. The workshops also provided a significant opportunity for colleagues who would not normally work together to engage with a shared language around the topic of transformative partnership.

Cities Rise

citiesRISE was created in 2018 with the aim of improving the lives of one billion young people around the world through transformation of policy and practice of mental health and well-being, using cities as the key entry point for initiating systems change. In recognition of the fact that it has many existing partners and partnerships, and many potential new partners that would like to engage with citiesRISE, TPI was engaged to systematise citiesRISE's partnerships, to prioritise which partners to engage with, and on what basis. Engaging through workshops in the US and South Africa, the project focussed on strengthening the Theory of Change for citiesRISE, identifying ideal future state on partnering and creating a results framework.

World Resources Institute Partnership Unit Support

In 2023, the globally renowned World Resources Institute (WRI) created a new partnerships unit, dedicated to building on WRI's considerable legacy and ramping up WRI's ambitions to collaborate more widely and with new actors for more transformational impact. TPI worked closely with the partnerships team and the Global Executive Team to understand current practice, help to create consensus around the future organisational ambition, the internal and external barriers and enablers and capability requirements, as well as making comparisons with experiences and good practice from other major organisations.

Heifer International

Heifer International has been working for over 75 years to end hunger and poverty – while protecting the environment – by supporting smallholder farmers and their communities. It currently operates in 21 countries across Africa, the Americas, and Asia.

Over the past few years, there have been shifts in its operating model, by diversifying sources of funding, ambition for greater impact, and a push towards wider collaboration, including with the private sector. The second significant shift has been the move towards regionalisation, and a degree of strategy-setting and decision-making moving closer to country-level implementation.

In the context of these strategic shifts, TPI was asked to undertake a review of Heifer's approach to partnering and to provide a baseline on current practice. We undertook a fit for partnering exercise which covered Heifer's partnership portfolio, its partnering culture, and staff skills and competencies.

Novo Nordisk

TPI continued its support to Novo Nordisk, working with the company to understand the institutional accelerators and barriers for collaboration, as well as helping to build professional competencies for collaboration.

Hope and Homes for Children

TPI designed and facilitated a session on strategic partnerships for Hope and Homes for Children as part of a workshop with senior managers to develop a new business plan. The session used TPI's knowledge of transformational partnerships and collaborative advantage to help the participants develop and populate a partnership typology for their existing partnerships, as well as looking forward to future strategic collaboration.

Ripple Effect

TPI worked with the Ripple Effect (formerly Send a Cow) to support their UK Aid Match (FCDO) partnership "Living with Wildlife" throughout its lifecycle. The partnership focused on wildlife conservation and sustainable community livelihoods in the Murchison Falls National Park in Uganda. Ripple Effect teamed up with wildlife conservation charity Tusk and their local partner Uganda Conservation Foundation (UCF) to find solutions to human-wildlife conflict. Through initial partnership training and goal-setting, to regular workshops and a partnership review, the TPI team was able to support the partnership through the challenges of Covid and local climate change impacts. Thanks to the Living with Wildlife project, 38,000 people in the Murchison Falls area now have improved food security, increased livelihood opportunities, and more positive relations with Uganda Wildlife Authority.

Collaborative Partnership of Forests

TPI completed its assessment of the effectiveness and impact of the Collaborative Partnership of Forests (CPF). This is an informal, voluntary arrangement among 15 international organisations with substantial programmes on forests. Findings from the assessment, as well as recommendations, and suggestions for the way forward were included in the final report that was shared with FAO in December 2022, and at a meeting in Rome with all the partners, funders and key government partners.

World Food Programme (WFP)

TPI worked with the World Food Programme to review the implementation of their 'partnership action plans', which were intended to guide and maximise the contribution of partnership to WFP's operations at country level. TPI undertook a major survey and document review, together with a series of consultation workshops, which resulted in suggested shifts to the design of the Partnership Action Plans (PAPs), bringing them much closer to overall country strategies, while also addressing ongoing relationship management processes through a separate but linked mechanism. This re-ordering of the PAPs helped to better integrate partnerships into established management systems, rather than partnerships being seen as a somewhat separate and parallel system.

Ethical Tea Partnership (ETP)

In addition to a number of training events with ETP (see section 4.5), TPI provided partnership health support to one of ETP's partnerships.

Development Initiatives (DI)

Through two workshops with staff, TPI undertook a rapid diagnostic of DI's organisational capacity to partner effectively. The main output was a framework for building strong partnerships aligning with best practice partnership working, along with guidance and tools for how to successfully manage each stage required to develop a partnership. A tool was also shared for scoping and defining the different types of partnerships DI may want to undertake, accompanied by a road map setting out what DI should aim to deliver or change to achieve their goals in partnership.

Wellcome Trust

TPI has been working with Wellcome Trust since August 2022, taking a flexible, long term 'Accompanying Partner' approach, to accompany the foundation on its journey to becoming a partnering powerhouse. TPI supports Wellcome to build its externally focused partnering function with strategic partners as well as its internal partnering support role, and supporting the foundation to become an inclusive partner of choice.

Work in this financial year included: the development of a partnership typology, a tool and process for assessing and selecting potential strategic partners, development of a partnership M&E framework and added value and health check tools. TPI also supported a partnership community of practice and undertook a research piece on public-private-philanthropy partnerships (PPPPs) for Climate and Health.

TPI undertook a broad 'Power and Partnerships' scoping study across the philanthropy landscape, looking at approaches and strategies being adopted by peers to partner equitably and globally; approaches and strategies being advocated, regarding access to funding and equitable partnership opportunities; a set of recommendations for Wellcome Trust's equitable partnering approach; recommendations for leveraging Wellcome Trust's influence and resources to support wider change. In line with Wellcome Trust's ambition to lead on Equity, Diversity and Inclusion, TPI undertook a review of EDI documents and developed a set of EDI metrics.

World Vision

TPI has been working with World Vision over a number of years, as an accompanying partner, to support their organisational development approach to becoming a Partner of Choice, in particular through supporting strategic and effective partnering at all levels and building internal partnering capabilities throughout the organisation. In 2023, TPI provided support in conducting interviews and analysis of interview data for a Partner of Choice review (based on TPI's Fit for Partnering approach) for World Vision Mali and World Vision DRC.

4.5. Open and tailored trainings

Open training

TPI continued to develop and deliver its flagship *Building Effective Partnerships for Development* open training course, aimed at individual partnership practitioners. The online training combines virtual group sessions with inter-module assignments, to be completed individually or in groups. These assignments are designed to provide space for both individual reflection and the opportunity to take the tools, frameworks and concepts covered in the sessions and apply them to their personal partnering context.

In 2022-23 TPI held 4 Building Effective Partnerships for Development courses, open for partnership practitioners from any global region or sector. The value of these online facilitated courses continues to be evident in the wide range of participants, allowing knowledge sharing among practitioners with both strong 'on the ground' experience and those with a more strategic outlook, leading to lively discussions and effective and interesting group work.

TPI also delivered a range of trainings on a variety of topics to individual organisations, including:

United Nations System Staff College (UNSSC)

TPI has been a partner with UNSSC since 2007, and we are delighted to provide the partnership sessions into a range of UNSSC courses. In 2022/23, courses included the UN Secretariat Executive Management Programme,

CIFF

TPI continued its work with CIFF, delivering the second in a series of training courses designed to support CIFF's new people strategy and leadership behaviour framework which include collaboration across the organisation and strengthening external partnerships. This new Building Effective Relationships course develops competencies to support effective relationships, both internally and in

external partnerships. Following internal scoping, a programme of seven modules was developed including mapping collaborative landscapes, influencing with and without power, dealing with conflict and challenges, effective negotiation, facilitation skills, and an introduction to collaborative leadership.

Ethical Tea Partnership

TPI has worked with ETP to build the partnering capacity of its UK and regional office staff over the last two years. TPI originally design and delivered a six-session tailored online course for two training cohorts in 2021 and followed this with the delivery of a two day in-person tailored course for a third cohort in December 2022. Both the online and in-person course were designed to provide staff with a common language and understanding around the principles of effective partnering using context specific examples and scenarios. Later in 2023 TPI will be hosting an online workshop for all course participants to take a deeper dive into some of the challenges identified in the in-person course.

Mennonite Economic Development Associates

In March of 2023, TPI worked with MEDA, an international economic development organisation that creates business solutions to poverty, to design and deliver online facilitated training programme. This 6-session course was designed to support MEDA's strategic partnerships work in agri-food market systems, focussing primarily on women and youth in rural communities in the Global South. The course brought together established partnership theory and practice alongside specific sessions to build understanding of MEDA's potential value as a 'partner of choice' and how to contextualise the course learning to feed directly into MEDA's country strategies.

SIOC-CDT

In August 2023 TPI worked with the Sishen Iron Ore Company-Community Development Trust, established to invest in the development of communities in which Kumba Iron Ore Limited operates. Focussing primarily on the foundational aspects effective partnership, participants in this two day in-person course, undertook group work aimed at building understanding around the opportunities of cross-sectoral partnerships, including partnership and engagement with local communities.

4.6. Outreach

Global policy influence through the Partnership Accelerator

Much of TPI's outreach, aiming to build global understanding of partnerships for sustainable development and the need to invest in the capabilities and enabling environment to make partnerships happen was undertaken through the Partnership Accelerator activities described above.

Philea 'What if? Reimagining Philanthropy' Event

In November 2022, TPI had the pleasure of co-hosting Philea's fifth "What if? Reimagining Philanthropy" event, together with Jacobs Foundation, on how funders can support partnership in efforts to drive systems change. With speakers and participants from both philanthropy and civil society, the discussions highlighted some of the challenges and opportunities facing funders with ambitions to partner more effectively and equitably in pursuit of systems change.

Watch and Jewellery Initiative 2030

In November 2022, TPI Executive Director Darian Stibbe was an Independent Observer at the inaugural members meeting of the Watch and Jewellery Initiative 2030 (WJI) in Paris, providing commentary and inputs on best practice partnering. The Initiative comprises a vast group of luxury goods brands and 'maisons' including Kering and Cartier (founding members), along with Chanel, Pandora and Gucci

among others. The collective mission of the initiative is to create a fully sustainable watch and jewellery industry that is resilient to climate change, preserves resources and fosters inclusiveness. By bringing together a core group of progressive companies and fostering collective action, the WJI aims to support a transformation in industry practice.

PPPPs WAPPP and TPI roundtable

On the 7th of September 2023, building on WAPPP's Philanthropy Forum discussions, TPI hosted the roundtable event "Public-Private-Philanthropy Partnerships for People and Planet - Meet pioneers of transformative PPPPs" which delved deeper into the vital intersection of the public, private, and philanthropy sectors in tackling today's significant global challenges, including climate change, health crises, food scarcity, digital exclusion, and just transition.

The event was moderated by Max von Abendorth and attended by global leaders who are initiating, facilitating and leveraging impact of PPPPs for people and planet from the likes of UNICEF, The World Bank and the Connect Humanity Fund.

SDG Partnership Symposium – Unleashing the power of MSPs

On September 17th, 2023, the SDG Partnership Symposium was held in New York City on the eve of the 2023 SDG Summit. The subject of the event was addressing challenges and solutions for unleashing the power of multi-stakeholder partnerships (MSPs) to achieve the Sustainable Development Goals (SDGs) and climate goals.

TPI's Executive Director, Darian Stibbe, presented the study "Shifting the System: How to Unleash the Power of Partnership for the SDGs and Climate Action" during the Symposium. The study's findings, based on a global survey and interviews, highlighted the need for professionalizing partnering skills, optimizing organisational setups for collaboration, adjusting funding models, and establishing multi-stakeholder partnership platforms.

UNDP Climate Finance Network Webinar on Philanthropy for Climate Action

On the 6th of September 2023, the UNDP Climate Finance Network organised a webinar titled "Philanthropy for Climate Action." The event aimed to showcase opportunities for utilising philanthropy as an alternative source of climate finance, especially for adaptation and resilience in the Asia-Pacific region. TPI was part of the panel of speakers, along with representatives from organisations like the World Economic Forum and the Asian Venture Philanthropy Network, where they highlighted the potential of philanthropy in bridging the climate finance gap and facilitating philanthropic giving for climate action.

Workshop with European Community Foundation Initiative

On June 29th, 2023, TPI delivered a partnership workshop at the European Community Foundation Initiative (ECFI) network meeting in London. The subject of the event focused on partnering for the Sustainable Development Goals (SDGs), where TPI presented its framework for philanthropic partnering approaches. TPI's role was to introduce this framework consisting of four partnership models foundations can adopt, facilitate discussions on how these models resonate with the work of community foundations in Europe, and explore how community foundations' unique insights and partnership approaches can contribute to achieving the SDGs through effective collaborations.

Partnerships for a sustainable future - Alliance Magazine publication

Partnerships for a sustainable future: Philanthropy's emerging role in public-private collaboration, written by Anna Hirsch-Holland and Max von Abendorth, was published in Alliance Magazine in April 2023. The article discusses TPI's emerging role in promoting public-private-philanthropy partnerships (PPPPs) for addressing global challenges such as climate change and inequality. It mentions that, in April, TPI

hosted a virtual session to explore examples of PPPPs at local, national, and global levels, with the aim of understanding their potential for scalable impact.

4.7. Future plans

TPI will continue to provide services and training, build on existing programmes, and develop new major initiatives to scale up our impact.

2030 Agenda Partnership Accelerator

TPI's future plans as part of the Partnership Accelerator include:

- A programme of activities to support partnering in Small Island Developing States (SIDS). This will include training and workshops in Bangkok, as well as policy inputs into the SIDS 4 conference in 2024 where we will launch a paper on a revised SIDS Partnerships Framework;
- Continued support to country offices and trainings.

Global Forum for National SDG Advisory Bodies

TPI will continue to support the Global Forum as its secretariat, while piloting a distributed model with regional network facilitators in Latin America and Africa. We plan to hold a Steering Committee meeting in Oxford in January 2024, and support a number of Forum events at the UN's High Level Political Forum (HLPF) in New York in July 2024.

Partnering for Philanthropic Impact

TPI will continue and expand its work towards a step change within philanthropy, maximising its transformational impact through engaging in, and supporting, multi-stakeholder collaboration.

With the continued support of Laudes Foundation and the African Climate Foundation, we plan to complete the first phase of the Public Private Philanthropy Partnership research project, with the launch of the report: ['Systems Change Activation: Empowering philanthropy's catalytic role in transformational PPPPs'](#) in December 2024.

The next phase will involve disseminating research findings through our global partners (WAPPP, WINGS) and regional philanthropy associations (AVPA for Africa, AVPN for Asia, Latimpacto for Latin America and Philea for Europe) through virtual and in-person events. We will also undertake a needs assessment to better understand philanthropy's ambitions, constraints and needs to engage in partnerships for systems change, to input into the design of the next phase of the programme.

Finally, we will be providing direct support to, and developing cases studies of, a number of PPPPs and drawing out learning for the wider sector.

Network of partnership support organisations

Since its inception TPI has sought to work with nationally-based partnership support organisations, including ALIARSE in Costa Rica, Global CAD in Spain and Out of the Box in Lebanon / Kenya. As part of our new strategy we have sought to be more proactive in building a network of these organisations. There are now around eight of these organisations that have all contacted TPI for support and we are looking for ways to support this emerging network, for example through offering expert guidance on effective partnership support strategy and business models for social enterprises.

Open training

TPI will continue to facilitate its flagship Building Effective Partnerships for Development open training course for individual partnership practitioners, and aims to re-introduce in-person courses, hosted in the Global South, in addition to continuing facilitated online learning.

Over the next few years TPI also aims to build on its current open training course options, utilising TPI's programmatic experience and materials developed across its tailored training programmes to include increased focus on relationship building and masterclasses on building more advanced skills.

The Transformational Partnership Academy

TPI will continue to develop its concept for The Transformational Partnership Academy seeks to empower a revolution in the professionalization of partnering and so dramatically improve the efficiency and transformational impact of collaboration worldwide. Our vision is a standards-based revolution in partnering practice at three levels: Individuals will have the necessary professional skills and competencies; Organisations will be institutionally fit for partnering – i.e. they will have the right strategy, leadership, systems and processes, staff capability and, essentially, a culture that multiplies opportunities and accelerates collaboration; Partnerships will operate to best practice standards, delivering the greatest impact and providing the best return on investment to funders and partners.

5. ADMINISTRATION

5.1. Public benefit

The Trustees have complied with their duty to have due regard to the guidance on public benefit published by the Charity Commission in exercising their powers and duties.

5.2. Financial review

The results of the charity for the year can be seen on page 24.

5.3. Reserves policy

The Partnering Initiative aims to maintain in reserve six months' worth of operating costs (approximately £300k), along with a development budget for creating new cutting-edge programmes or investing in the organisation. As of 30th September 2023, free reserves held were £364,756, which the Trustees deem acceptable.

6. STATEMENT OF TRUSTEES' RESPONSIBILITIES

The Trustees (who are also directors of The Partnering Initiative for the purposes of company law) are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the Trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for the year. In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP 2019 (FRS 102);
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The Trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- there is no relevant audit information of which the charitable company's auditor is unaware; and
- the Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditor is aware of that information.

The Trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

This report has been prepared having taken advantage of the small companies' exemption in the Companies Act 2006.

This report was approved by the Board, 21st June 2024.



Katherine Hartley
Chair of Trustees

7. INDEPENDENT AUDITORS' REPORT TO THE MEMBERS OF THE PARTNERING INITIATIVE

7.1. Opinion

We have audited the financial statements of The Partnering Initiative (the 'charitable company') for the year ended 30th September 2023 which comprise the Statement of Financial Activities, the Balance Sheet, the Cash Flow Statement, and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 30th September 2023, and of its incoming resources and application of resources, including its income and expenditure (including income from the United Nations and related expenditure), for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

7.2. Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

7.3. Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

7.4. Other information

The trustees are responsible for the other information. The other information comprises the information included in the trustees' annual report, other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

7.5. Opinions on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

- the information given in the trustees' report (incorporating the directors' report) for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the directors' report has been prepared in accordance with applicable legal requirements.

7.6. Matters on which we are required to report by exception

In the light of our knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept, or returns adequate for our audit have not been received from branches not visited by us; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of directors' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit; or
- the trustees were not entitled to prepare the financial statements in accordance with the small companies' regime and take advantage of the small companies' exemptions in preparing the directors' report and from the requirement to prepare a strategic report.

7.7. Responsibilities of trustees

As explained more fully in the trustees' responsibilities statement set out on page 19, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

7.8. Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The specific procedures for this engagement and the extent to which these are capable of detecting irregularities, including fraud are detailed below:

- Enquiry of management and those charged with governance around actual and potential litigation and claims;
- Enquiry of management and those charged with governance to identify any instances of non-compliance with laws and regulations;
- Reviewing minutes of meetings of those charged with governance;
- Reviewing financial statement disclosures and testing to supporting documentation to assess compliance with applicable laws and regulations;
- Performing audit work over the risk of management override of controls, including testing of journal entries and other adjustments for appropriateness, evaluating the business rationale of significant transactions outside the normal course of business and reviewing accounting estimates for bias.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater

regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

7.9. Use of our report

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.



Benjamin Hayes BSc FCA (Senior Statutory Auditor)

21st June 2024

For and on behalf of Wenn Townsend Chartered Accountants, Statutory Auditor

30 St Giles
Oxford
OX1 3LE

8. FINANCIAL STATEMENTS

8.1. Statement of Financial Activities (including Income and Expenditure Account) for the period ended 30th September 2023

		Unrestricted funds 2023	Restricted funds 2023	Total funds 2023	Total funds 2022
		£	£	£	£
Income from:	Note				
Charitable activities	2	717,738	177,367	895,105	874,939
Total income		717,738	177,367	895,105	874,939
Expenditure on:					
Charitable activities	3	697,679	177,367	875,046	791,198
Total expenditure		697,679	177,367	875,046	791,198
Net movement in funds		20,059	-	20,059	83,741
Balances b/f at 1 st October 22		344,697	-	344,697	260,956
Balances c/f at 30 th September 23		364,756	-	364,756	344,697

All income and expenditure derive from continuing activities.

The statement of financial activities includes all gains and losses recognised during the year.

The notes, section 8.5, page 27, form part of the financial statements.

8.2. Balance Sheet as at 30th September 2023

	Notes	2023 £	2022 £
Current assets			
Debtors	6	429,084	378,206
Cash at bank and in hand		41,377	95,653
		470,461	473,859
Creditors: falling due within one year	7	(105,705)	(129,162)
Net current assets		364,756	344,697
Net assets		364,756	344,697
Funds:			
Unrestricted funds			
General funds		364,756	344,697

8.3. Board approval

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

The financial statements were approved and authorised for issue by the trustees on 21st June 2024 and signed on their behalf by:



Marta Garcia
Treasurer

The notes, section 8.5, page 27, form part of the financial statements.

8.4. Statement of cash flows for the year ended 30th September 2023

	2023 £	2022 £
Reconciliation of net income to net cash flow from operating activities		
Net income for year	20,059	83,741
Increase in debtors	(50,878)	(181,669)
(Decrease) / increase in creditors	(23,457)	56,733
Net cash flow from operating activities	(54,276)	(41,195)
 Net increase / (decrease) in cash and cash equivalents	 (54,276)	 (41,195)
Cash and cash equivalents at 1st October 2022	95,653	136,848
Cash and cash equivalents at 30th September 2023	41,377	95,653

The notes, section 8.5, page 27, form part of the financial statements.

8.5. Notes forming part of the financial statements for the period ended 30th September 2023

1. Summary of significant accounting policies

a) General information and basis of preparation

The Partnering Initiative is a charitable company limited by guarantee and is incorporated in England. In the event of the charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the charity. The address of the registered office is given in the charity information in these financial statements. The nature of the charity's operations and principal activities are detailed in the Trustees' Report.

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on a going concern basis under the historical cost convention modified to include certain items at fair value. The financial statements are prepared in sterling which is the functional currency of the charity. Monetary amounts in these financial statements are rounded to the nearest pound sterling.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

b) Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

c) Income recognition

All income is included in the Statement of Financial Activities (SoFA) when the charity is legally entitled to the income after any performance conditions have been met, the amount can be measured reliably and it is probable that the income will be received.

The charity receives government grants in respect of the Coronavirus Job Retention Scheme. Income from government and other grants are recognised at fair value when the charity has entitlement after any performance conditions have been met, it is probable that the income will be received and the amount can be measured reliably. If entitlement is not met then these amounts are deferred.

Project grants and service contract fees are included as income where any work involved has been undertaken by the period end date. Any income received in advance is deferred until associated costs are incurred and based on the level of completion of the project.

Gifts in kind donated for distribution are included at valuation and recognised as income when they are distributed to the projects. Gifts donated for resale are included as income when they are sold. Donated facilities are included at the value to the charity where this can be quantified

and a third party is bearing the cost. No amounts are included in the financial statements for services donated by volunteers.

d) Expenditure recognition

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure is recognized where there is a legal or constructive obligation to make payments to third parties, it is probable that the settlement will be required and the amount of the obligation can be measured reliably.

Irrecoverable VAT is charged as an expense against the activity for which expenditure arose.

Fund-raising costs are those incurred in seeking voluntary contributions and do not include the costs of disseminating information in support of the charitable activities. Support costs are those costs incurred directly in support of expenditure on the objects of the charity and include project management. Governance costs are those incurred in connection with administration of the charity and compliance with constitutional and statutory requirements.

e) Foreign currencies

Foreign currency transactions are initially recognised by applying to the foreign currency amount the spot exchange rate between the functional currency and the foreign currency at the date of the transaction.

Monetary assets and liabilities denominated in a foreign currency at the balance sheet date are translated using the closing rate.

f) Employee benefits

When employees have rendered service to the charity, short-term employee benefits to which the employees are entitled are recognised at the undiscounted amount expected to be paid in exchange for that service.

The charity operates a defined contribution plan for the benefit of its employees. Contributions are expensed as they become payable.

g) Debtors and creditors receivable/payable within one year

Debtors and creditors with no stated interest rate and receivable or payable within one year are recorded at transaction price. Any losses arising from impairment are recognised in expenditure.

h) Tax

The charity is an exempt charity within the meaning of Schedule 3 of the Charities Act 2011 and is considered to pass the tests set out in Paragraph 1 Schedule 6 Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes.

i) Going concern

The financial statements have been prepared on a going concern basis as the trustees believe that no material uncertainties exist. The trustees have considered the level of funds held and the expected level of income and expenditure for 12 months from authorizing these financial statements. The trustees have included an assessment of the impact of COVID-19 as part of this assessment. The budgeted income and expenditure is sufficient with the level of reserves for the charity to be able to continue as a going concern.

2. Income from charitable activities

	2023	2022
	£	£
Service contract fees	342,401	495,784
Programmes	420,422	212,818
Training courses	123,019	166,337
Grants	8,484	-
Other income	779	-
	895,105	874,939

Total restricted income included in the above is £177,367 (2022: £22,139).

3. Charitable activities

	Direct charitable costs £	Indirect charitable costs £		Total 2023 £	Total 2022 £
		Core organisational*	Governance		
Consultancy	218,638	2,578	-	221,216	311,066
Wages and salaries	376,040	134,662	15,153	525,855	428,589
Grants	8,559	-	-	8,559	-
Venue hire	7,846	-	-	7,846	-
Travel & accommodation	33,598	2,893	-	36,491	17,745
Rent and rates	-	23,317	-	23,317	26,828
Website & IT costs	696	8,316	-	9,012	11,838
Marketing, postage & stationery	468	7,341	-	7,809	1,486
Telephone	-	1,160	-	1,160	1,220
Bank charges	-	3,281	-	3,281	3,817
Insurance	-	839	-	839	1,164
General expenses	1,021	11,550	13	12,584	19,441
Audit fees	-	-	3,900	3,900	4,073
Foreign exchange (gains)/losses	8,808	3,977	392	13,177	(36,069)
	655,674	199,914	19,458	875,046	791,198

*Core organisational costs include all non-programme-attributable costs including administration, policy engagement, new programme research and development, unfunded knowledge product generation, communication and dissemination.

Total restricted expenditure included in the above is £177,367 (2022: £22,139).

4. Trustees' and key management personnel remuneration and expenses

During the year, no Trustees received any remuneration or other benefits (2022: £nil).

During the year, expenses totalling £102 were reimbursed to one Trustee (2022: £nil).

The total amount of employee benefits received by key management personnel was £232,932 (2022: £218,961). The Trustees consider the charity's key management personnel comprise the Board of Trustees, the Chief Executive, and the senior management team.

5. Staff costs

	2023	2022
	£	£
Wages and salaries	395,051	350,627
Social security costs	38,604	33,849
Pension costs	92,200	44,113
	525,855	428,589

The number of employees whose emoluments as defined for taxation purposes amounted to over £60,000 in the year was as follows:

	2023	2022
Number	Number	
£80,001 - £90,000	1	-
£90,001 - £100,000	-	1

The average number of employees, calculated on a full-time equivalent basis, analysed by function was:

	2023	2022
	Number	Number
Charitable activities	8	7
Management and administration of the charity	2	2
	10	9

6. Debtors

	2023	2022
	£	£
Grants and fees receivable	127,524	279,886
Prepayments and accrued income	301,541	98,301
Other debtors	19	19
	429,084	378,206

7. Creditors: amounts falling due within one year

	2023 £	2022 £
Trade creditors	19,958	51,501
Accruals and deferred income	57,453	49,838
Other tax and social security	28,294	27,823
	105,705	129,162

8. Restricted funds

	At 1 st October 2022 £	Income £	Expenditure £	Transfers £	At 30 th September 2023 £
Global Forum (GIZ)	-	101,982	(101,982)	-	-
PPPP	-	66,901	(66,901)	-	-
CSSI	-	8,484	(8,484)	-	-
Total restricted funds	-	177,367	(177,367)	-	-

Global Forum (GIZ)

Secretariat services for the Global Forum for National SDG Advisory Bodies.

PPPP

Public Private Philanthropy Partnership research programme.

CSSI

Funding to support the hosting of the Cross-sector Social Interactions conference (Cape Town, April 2024), and travel bursaries for a number of participants.

In the prior year, restricted funds related to funds from GIZ for the Global Forum Project. €42,437 (£36,719) was received in September 2022, with £15k deferred as at 30th September 2022 and recognised in the current year.

9. Related parties

There were no related party transactions in the current or preceding year.



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Twitter: @TPIglobal
LinkedIn: The Partnering Initiative
Charity number: 1154259

THE PARTNERING INITIATIVE

England & Wales - Charity number 1154259

Accounts



THE PARTNERING INITIATIVE

Trustees' Annual Report and Accounts 2021-22

England & Wales Company no.: 08528402

England & Wales Charity no.: 1164259

Address: 21b Park End Street, Oxford, OX1 1HU, United Kingdom

TRUSTEES' ANNUAL REPORT

1st October 2021 - 30th September 2022

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1. LEGAL AND ADMINISTRATIVE INFORMATION

1.1. Trustees

James Cole (appointed 13th January 2022)

Sean De Cleene

Marta Garcia (Treasurer, appointed 13th January 2022)

Thomas Hale

Katherine Hartley (appointed 13th January 2022)

Thomas Lingard (resigned 31st March 2022)

Marianne Mwaniki (appointed 13th January 2022)

Caron Rohsler

Robert Smith (Chair and Treasurer, resigned 31st March 2022)

Elizabeth Stuart (Chair, appointed 13th January 2022)

1.2. Chief Executive

Dr Darian Stibbe

1.3. Registered Office

21B Park End Street
Oxford OX1 1HU
United Kingdom

1.4. Auditors

Wenn Townsend
30 St Giles
Oxford, OX1 3LE, United Kingdom

1.5. Bankers

Metro Bank

4-5 Queen Street, Oxford, OX1 1EJ, United Kingdom

The trustees, who are also directors of the charity for the purposes of the Companies Act, submit their annual report and the audited financial statements for the year ended 30th September 2022. The trustees have adopted the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities" (FRS 102) in preparing the annual report and financial statements of the charity.

2. STRUCTURE, GOVERNANCE AND MANAGEMENT

The charity is a charitable company limited by guarantee, set up on 14th May 2013. It is governed by a memorandum and articles of association.

2.1. Organisational structure

The Partnering Initiative operates out of a central hub in the UK with a core staff working on programme development and delivery, partner relations and communication. Our development projects, action research, strategic consultancy support and training services are delivered internationally through both core staff and a global network of highly experienced Associates. A key feature of all The Partnering Initiative's activities is the drawing out of cutting-edge knowledge on the theory and practice of partnership which is then disseminated widely through online knowledge exchange and webinars, guidebooks, reports and other publications.

The Partnering Initiative is run by an Executive Director reporting to a multi-sector independent Board.

2.2. Key management personnel remuneration

The Trustees consider the Board of Trustees and the senior management team of the Executive Director plus two senior directors as comprising the key management personnel of the charity in charge of directing and controlling the charity and running and operating the charity on a day-to-day basis. All Trustees give their time freely and no Trustee remuneration was paid in the year. Details of Trustee expenses and related party transactions are disclosed in note 4 to the accounts.

Trustees are required to disclose all relevant interests and, in accordance with policy, withdraw from decisions where a conflict of interest arises.

The pay of the Executive Director is reviewed annually by the Trustees to ensure it is commensurate with experience and performance and fair in comparison with similar roles. The pay of the senior directors automatically increases annually by the lower of inflation or two per cent and is reviewed annually by the Executive Director to ensure salaries are competitive, fair and commensurate with the role, experience and performance. Due to the increased cost of living in the UK during the year, an additional amount of £1,000, pro-rated, was paid to all members of staff including senior directors.

2.3. Risk management

The Trustees have implemented systems to be followed by Charity staff with a view of ensuring that the risks of financial loss are minimized. Trustees and Charity staff review the appropriateness of these procedures annually and ensure that they are being adhered to. The Trustees have also examined other operational and business risks that might arise and confirmed that they have established systems to mitigate the significant risks. Over the course of the last year, the Trustees have considered the financial risks facing the Charity at every Trustees' meeting.

3. OBJECTIVES AND ACTIVITIES

The Partnering Initiative is a UK-based, globally-operating charity dedicated to **driving effective multi-sector collaboration for a sustainable future.**

3.1. TPI's vision and mission

TPI passionately believes in the power of collaboration across societal sectors to leverage complementary resources and unleash the innovation necessary to achieve prosperous, sustainable business and societies. We are working to realize a world in which business, governments, NGOs, international organisations, communities and academia combine their resources through partnership at an unprecedented scale to maximize collective business and societal value and drive sustainable development.

TPI's ambitious mission is to drive the development of the enabling environment, the 'infrastructure' of support, the quality of collaboration, and the competencies necessary to scale up and mainstream effective partnerships for the Sustainable Development Goals (SDGs) globally.

3.2. TPI's charitable purpose

The charity is a charitable company limited by guarantee and was set up on 14th May 2013. It is governed by a memorandum and articles of association. TPI's mission is to drive widespread effective cross-sector collaboration for a sustainable future by:

1) Promoting sustainable development for the benefit of the public by:

- Raising awareness and promoting the use of cross-sector partnerships globally.
- Building systemic, institutional and individual capacity across all societal sectors to develop and support effective partnerships.
- Directly and indirectly supporting the development and effective delivery of cross-sector partnerships globally.
- Promoting and undertaking study and research in cross-sector partnerships and disseminating useful results of such a study to the public at large.
- Supporting the development of an enabling architecture to drive the scaling up of the use of cross-sector partnerships globally.

2) Advancing the education of the public in subjects relating to cross-sector partnerships globally.

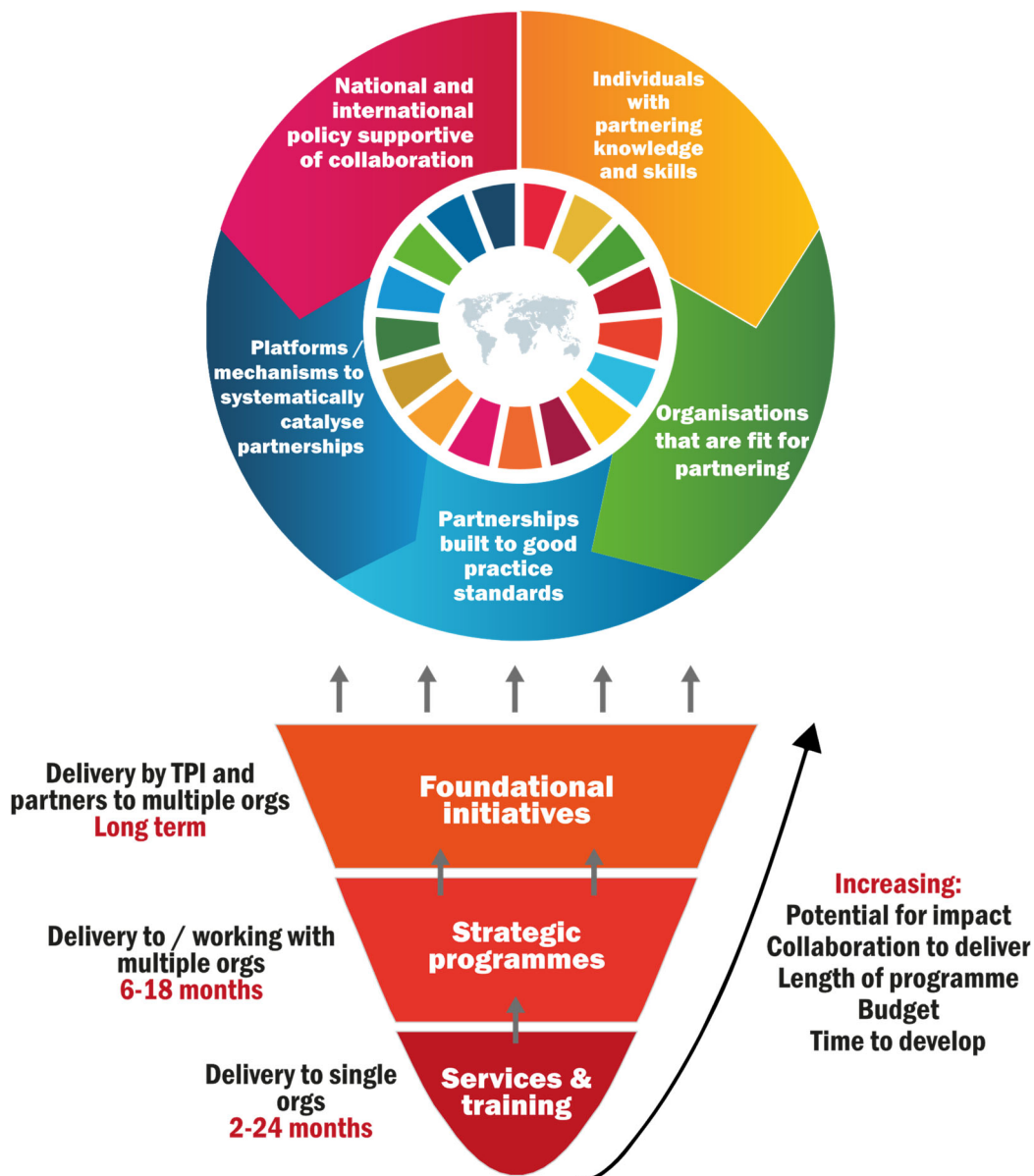
Note: Sustainable development is defined as "development which meets the needs of the present without compromising the ability of future generations to meet their own need"

Cross-sector collaboration or partnership is defined as "any combination of public, private, NGO, UN or other bodies working together to achieve common objectives which contribute to sustainable development."

4. DETAILS OF SIGNIFICANT ACTIVITIES FOR ACHIEVING OBJECTIVES

4.1. TPI's approach

TPI's cutting-edge, holistic approach aims to enable, at scale, five key 'building blocks' required to engage business in development and drive multi-stakeholder partnerships as an essential mechanism towards delivering the Sustainable Development Goals (SDGs).



TPI delivers its mission through a mixed portfolio: i) services and training to individual organisations; ii) strategic collaborative programmes which engage multiple organisations to collectively drive forward the state of the art of partnering in specific areas; iii) foundational initiatives – major programmes delivered collectively with other organisations to build an enabling eco-system that can deliver partnerships at scale.

4.2. Foundational initiative: Partnership Accelerator for the 2030 Agenda

The Partnership Accelerator for the 2030 Agenda is a major programme with the United Nations Department of Economic and Social Affairs (UN DESA), along with UN Office for Partnerships (UNOP), UN Global Compact and UN Development Coordination Office. The programme works in two areas:



- Partnership platforms: Supporting effective country-driven multi-stakeholder partnership platforms and mechanisms that can engage business and other stakeholders, and catalyse partnerships for the SDGs; drawing out best practices and guidance to assist optimizing emerging platforms; and supporting a new generation of UN Resident Coordinators and country teams.
- Partnership skills and competencies: building capacity of relevant stakeholders to develop and implement partnerships for the SDGs, and to support organizations to develop their policy and strategy, systems and processes, legal agreements, and culture to support collaboration.

Activities and achievements over the financial year include:

- Strengthening partnerships between stakeholders in Maldives on waste management and mental health, through organisation of partnership labs and consultations.
- Supporting the organisation of the Mexico Partnership Forum to strengthen and scale multi-stakeholder and multisector engagement for SDGs, leading to the establishment of the Mexico Partnership Platform and UN's Partnership Strategy as a first in the region.
- Training national stakeholders from various sectors on how to build effective and impactful partnerships in the Bahamas.
- Establishing a network of partnerships champions to advance partnership knowledge in the Caribbean.
- Training stakeholders around the world on building partnerships for advancing Sustainable Development Goal 14 (Oceans).
- Launching an online Partnership Learning Centre with learning modules and resources on how to build and manage effective multi-stakeholder partnerships for the SDGs.
- Contributing to partnership discussions and trainings at the ECOSOC Partnership Forum and the High-level Political Forum on Sustainable Development.
- Undertaking an online training that formed the third day of the Jamaica Partnership Forum 2021.

To learn more, please see the Partnership Accelerator's [report on 2022 activities](#).

4.3. Strategic programmes and research

Partnering for Philanthropic Impact

During 2022, we reshaped the strategic approach of the programme around three strands. First, providing individual support to foundations trying to advance their partnering approach; second, facilitating knowledge sharing and peer exchange through events and communications products; and third, developing 'action research' projects to develop, pilot, and launch sector best practice. Underpinning all of this work have been the extensive efforts of the Programme Director to build TPI's network and reputation in the philanthropy sector – from attending the Philanthropy Europe Association annual conference, to setting up bilateral introductory calls with foundations and others in the philanthropy support ecosystem.

Individual support

TPI has been working directly with four major philanthropic organisations to support their strategic approach to collaboration: Johnson & Johnson Foundation, Jacobs Foundation, Wellcome Trust, and Porticus. Information on these projects is included in the 'direct and indirect support' and training sections below.

Knowledge exchange

- **Joint events:** TPI co-hosted three events together with others in the philanthropy ecosystem (Alliance Magazine; European Venture Philanthropy Association; Philanthropy Europe Association – together with Jacobs Foundation)
- **Peer exchange:** Around 20 foundations are now signed up to be part of the peer exchange group. At the close of the year, the first peer exchange session (on the topic of partnership M&E) was being planned, for 11 participants representing seven foundations.
- **Knowledge sharing:** Four articles were published in Alliance Magazine between June and August, as well as one additional blog on TPI's own website. In addition, TPI gave a presentation to the Bulgarian Donor's Forum in July, whose main representative subsequently wrote an article for Alliance on the same topic (re-posted on the TPI website).

Research project development

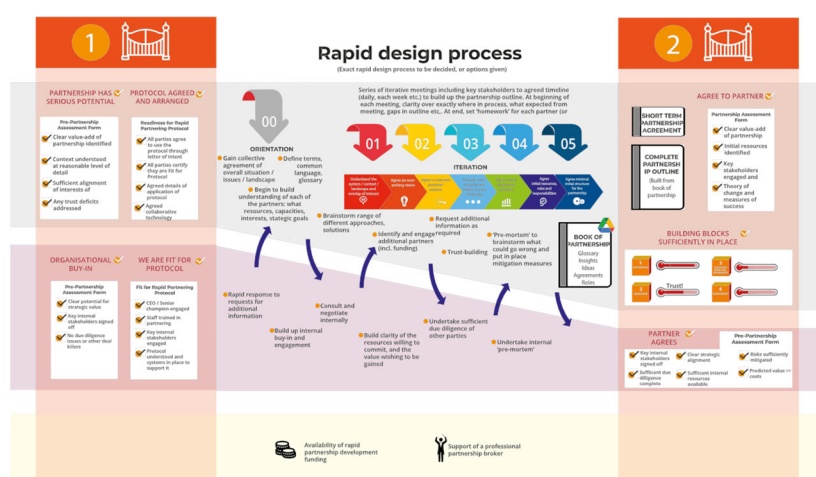
Activities to date in this area have been mainly around crystallizing ideas and identifying/galvanising interest (e.g. through peer exchange). A major focus topic for next year will be Power and Partnership.

Green Transition

TPI's Green Transition workstream was formally created during this financial year, with the aim of supporting effective collaboration to deliver a low-carbon, resource-efficient and socially-inclusive economy. TPI was represented for the first time at COP26 in Glasgow in November 2021 and in April 2022 by TPI's director of Green Transition.

TPI's appointment as independent assessors for the WRI's P4G (Partnering for Green Growth) fund for the third year running provided an excellent basis for understanding the landscape and partnering challenges. During 21-22, TPI drew together elements of its existing experience and learning in this area, including work with the UN's Partnership Accelerator supporting circular economy collaboration in the Maldives, and identified partnering for climate action as a priority for support.

After securing seed funding from Partnerships 2030, TPI invited climate practitioners to share their experiences of partnership working in order to better understand the blockages and accelerators for climate action collaboration via a short survey and a series of in-depth interviews. The results were shared with a peer group of practitioners in January 2022 via a virtual workshop, and a summary of findings was presented at the UN ECOSOC partnership forum in February 2022. The findings led to the development of a draft Rapid Partnering Protocol for Climate Action, which will inform accelerated partnering work across TPI's programmes.



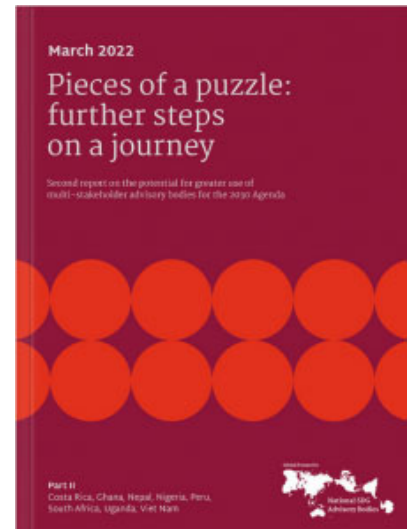
Global Forum for National SDG Advisory Bodies

Research

The Global Forum is a network of member organisations and associated strategic partners working towards the achievement of the SDGs. Global Forum members are national-level organisations that bring together voices from different sections of society and act as a critical friend to their national governments.

TPI was engaged by GIZ to conduct research for the Global Forum on the potential for greater use of multi-stakeholder advisory bodies to progress the 2030 Agenda in eight countries.

Following publication of the first report in 2021, TPI has produced a second report in collaboration with Aliarse and the German Council for Sustainable Development. In *Pieces of a Puzzle: Further Steps on a Journey*, eight countries are profiled, Costa Rica, Ghana, Nepal, Nigeria, Peru, South Africa, Uganda and Viet Nam.



Global Secretariat

In September 2022, TPI and African Monitor, an NGO based in South Africa, were appointed to manage the secretariat of the Global Forum.

The secretariat supports members and strategic partners and provides mechanisms and advice to help members engage with each other and share learning. Its role is also to grow the network and encourage national governments to recognise the value of members' activities and advice.

The initial focus has been on internal communications, network coordination, and setting up Communities of Practice. These bring Global Forum members together to share their experiences on a range of topics which they have selected.

Partnerships for Green Growth and the Global Goals (P4G)

Since 2018, P4G has conducted four annual calls for partnerships (2018, 2019, 2020, and 2021) and in 2021, P4G used an open application process with prospective partnerships submissions year-round.

Having acted as independent advisors in assessing the call for partnerships for the three years 2019-2021, TPI and GlobalCAD jointly supported P4G for the 2022 calls for partnerships. Through each cycle, the joint team conducted an independent evaluation and selection of shortlist partnerships. This evaluation was undertaken through a combination of a review and scoring of proposal materials, desk-top research and interviews (pitch calls) with the partnerships.

During the year, 30 partnerships were evaluated, with evaluations aiming not only to provide an objective assessment of the partnerships applying for P4G but further to draw strategic and forward-looking recommendations and lesson-learned to strengthen the selected scale-up partnerships in the future.

In addition, TPI worked with P4G on its strategy as it moved into a new phase. The work focussed on developing a typology of market systems interventions, a theory of change and a measurement framework to allow P4G to demonstrate its impact.

4.4. Services and support

citiesRISE

TPI has been working with citiesRISE, a global multi-stakeholder initiative that seeks to create 'mental health friendly cities' that support the well-being of young people. Our work currently includes strategic support and the development of a partnership framework to guide citiesRISE's future collaborations.

Novo Nordisk

TPI began working with Novo Nordisk in 2020, producing a partnership development model between the pharmaceutical industry and International Professional Associations (IPAs). TPI supported Novo Nordisk in developing guidance on the different forms of partnerships and how they can create value as well as a new partnership framework and partnering strategy.

This year TPI continued to support Novo Nordisk's impact strategy and framework, developing a strategy implementation guide, and designing and delivering a vision-to-action workshop. TPI helped to design and build a portfolio of supportive, integrative and transformative partnerships and maintain a network of IPA partners. TPI has supported Novo Nordisk to improve capacity for effective partnering, by undertaking a partnering competencies assessment to identify priority areas going forward and designing and delivering a partnering training workshop.

Heifer International

Heifer International has been working for over 75 years to end hunger and poverty – while protecting the environment – by supporting smallholder farmers and their communities. It currently operates in 21 countries across Africa, the Americas, and Asia. Heifer has established a long-term presence at country level and developed a proven approach based on direct engagement with smallholders and cooperatives.

In 2022 TPI began work with Heifer's Global Partnerships & Global Alliances teams as an accompanying partner, to undertake a Fit for Partnering analysis to assess their institutional capacity for partnering across their global office and three regional offices: Asia, Africa and The Americas.

TPI undertook a survey of staff involved in partnership work as well as a series of interviews with both Heifer partnering practitioners and representatives from Heifer's current and past partners.

The output of this work was the Heifer International Institutional Partnering Capacity report, completed in September 2022, with a set of high-level recommendations, and a strategic review workshop planned for early 2023.

FAO transformative partnerships

TPI worked with FAO's Partnership Support Unit to help develop a compelling definition and vision for 'transformative partnerships'. These partnerships, which contribute to their vision for transformed agrifood systems that are more resilient, efficient, sustainable and inclusive, are foundational to FAO's new strategic framework. TPI's support included developing an extensive guidance note containing definitions and examples of transformative partnerships; an assessment methodology designed to help programme staff assess the potential contribution that partnerships can make to the transformation of agri-food systems; and a partnership-level key performance indicator designed to measure the extent to which a partnership is delivering transformation. Next year TPI will be working with FAO at regional and country level to operationalise these tools and guidance documents.

Collaborative Partnership on Forests

TPI worked with FAO to conduct an assessment of the effectiveness and impact of the Collaborative Partnership on Forests (CPF), an informal, voluntary arrangement among 15 international organisations with substantial programmes on forests. Following a short orientation paper framing the current status of the CPF, TPI undertook an in-depth desk study, in combination with selected key informant interviews, and designed a survey for a self-assessment by CPF focal points, as part of the partnering review. Findings from the assessment, as well as recommendations, and suggestions for the set-up of a new member-led initiative, were all included in the final report that is helping CPF to shape its future strategy.

PROTECT

Following on from TPI's Learning from Consortium programme supporting 12 consortia funded by the FCDO's Aid Connect programme, TPI undertook a follow-up partnership health check of the PROTECT consortium. By comparing results with the original health check, the consortium was able to measure its progress, as well as identify areas on which to focus to optimise the quality and effectiveness of the collaboration.

Jacobs Foundation

TPI developed in-depth learning case studies for two JF collaborative initiatives. TPI also provided feedback on Jacob Foundation's 'Partnering Aspiration Statement', thereby helping to shape the strategic partnering approach of the organisation.

Wellcome Trust

TPI is an 'Accompanying Partner' to the WT 'Strategic Partnerships Team', helping them to refine and operationalise the partnering approach of the team, as well as their support offer to the rest of the organisation. The initial phase involved creating a roadmap for how to strengthen Wellcome Trust's partnering capacity/approach, followed up with specific work to develop a partnership typology, M&E framework/tools, partner selection process, and a 'Partnership Practice Group'.

Porticus

TPI undertook a study of 14 Porticus-supported programmes to understand the extent of the collaboration taking place in those programmes, the additional value this brought, and the enablers/barriers to strong collaboration. The report will be published in the next financial year.

World Vision

TPI has been working with World Vision over a number of years, as an accompanying partner, to support their organisational development approach to becoming a Partner of Choice, in particular through supporting strategic and effective partnering at all levels and building internal partnering capabilities throughout the organisation.

In 2022, TPI provided support in conducting interviews and analysis of interview data for a Partner of Choice review (based on TPI's Fit for Partnering approach) for World Vision Burundi and contributed to the write-up of the report. TPI conducted 16 staff and partner interviews, wrote up the staff interview and analysis with recommendations, and contributed to the production of the final Burundi Partner of Choice report.

AMGEN

TPI designed and delivered a workshop, *Partnering with intent*, to support AMGEN in its desire to become more ambitious in its strategy for partnering and to consider how practically to drive partnerships forward.

4.5. Open and tailored trainings

TPI continued to develop and deliver its flagship *Building Effective Partnerships for Development* open training course, aimed at individual partnership practitioners. The online training combines virtual group sessions with inter-module assignments, to be completed individually or in groups. These assignments are designed to provide space for both individual reflection and the opportunity to take the tools, frameworks and concepts covered in the sessions and apply them to their personal partnering context.

TPI also delivered a range of trainings on a variety of topics to individual organisations, including:

CIFF

In line with its new people strategy and leadership behaviour framework which include collaboration across the organisation and strengthening external partnerships, CIFF asked TPI to develop and deliver a new facilitated online course. The course developed competencies to support effective relationships, both internally and in external partnerships. Following internal scoping, a programme of seven modules was developed for multiple cohorts, including mapping collaborative landscapes, influencing with and without power, dealing with conflict and challenges, effective negotiation, facilitation skills, and an introduction to collaborative leadership.

Johnson & Johnson

As part of an ongoing project with the Johnson & Johnson Foundation to strengthen its institutional partnering capacity, TPI provided partnering training for J&J's Global Community Impact team. This was followed by the development of an online interactive self-guided course including tools, videos and podcasts which provided further guidance and insight into partnering for a wide audience within J&J.

Queen's University Belfast

In late 2021, TPI designed and delivered a five-session virtual tailored training course for employees of Queen's University Belfast. Course participants included representatives of the academic faculty, including both lecturers and researchers, and from the finance, estates and student affairs departments, with a varied range of partnering opportunities and challenges. The course focussed on the core skills, or fundamentals of effective partnering, with context-specific scenarios and the opportunity to identify common challenges and develop a core group of partnering champions across the University's broad partnership spectrum.

Southeast Asia One Health University Network (SEAOHUN)

Following on from the delivery of tailored training to the Africa One Health University Network in 2021, in 2022 TPI delivered a series of five online partnering training sessions to SEAOHUN, a network of universities and institutions across eight South East Asia countries focusing on healthcare. Representatives from seven countries attended the training, which was delivered to university and institutional professionals. It was developed as part of the USAID-funded One Health Workforce project, focusing on developing a workforce without disciplinary barriers, for more effective pandemic preparedness and response.

Sightsavers

Following previous work for Sightsavers in 2017 when TPI ran a workshop to support the organisation's effective and strategic partnering with and within consortia, in September 2022 Sightsavers commissioned TPI to design and deliver a bespoke facilitation and negotiation workshop for the organisation. The two-day, in-person course explored topics such as facilitation techniques and planning; interest-based negotiation and value maximisation negotiation; power, trust and stakeholders; online facilitation; influencing; and finally difficult conversations and conflict management.

Slipstream

In 2022, TPI designed and delivered a five-session facilitated online training course for Slipstream, a mission-driven non-profit that inspires new solutions to big energy challenges by empowering more people to adopt new practices and technologies. The course was designed to equip individual members of Slipstream's staff with the understanding and skills needed to partner effectively, and to support Slipstream's partnership work by inspiring a group of "partnership champions". The course focused on partnering fundamentals, value creation through partnership and identifying Slipstream's unique value proposition as a partner, understanding stakeholders and sectors, including engagement with community groups, trust, power and equity and the partnering relationship and practical action planning for the future.

UNESCAP

TPI delivered a tailored version of the Effective Partnering for Sustainable Development online training course for a cohort of key UNESCAP staff based in South and East Asia regional and sub-regional offices. Modules explored partnership typology and potential stakeholders; value creation through partnership; partnership negotiation and set-up; keeping partnerships effective; and finally troubleshooting and planning for the future.

UNSSC

TPI has continued to design and deliver tailored trainings as part of its longstanding collaboration with the UN Systems Staff College (UNSSC), building partnering capability across the UN system. In the last year, this included designing and delivering a partnership-building virtual workshop, for three successive cohorts, as part of the 2022 UN Secretariat Executive Management Programme; designing and delivering a partnership-building module, delivered to three successive cohorts, for the Food and Agriculture Organization of the United Nations (FAO) as part of the 2022 FAO-UNSSC Online Executive Leadership Certificate Programme; and designing a partnership module for two cohorts as part of the UNFPA Managerial Certification Programme.

4.6. Outreach

Much of TPI's outreach, aiming to build global understanding of partnerships for sustainable development and the need to invest in the capabilities and enabling environment to make partnerships happen was undertaken through the Partnership Accelerator activities described above. Some selected further outreach is provided below.

2022 ECOSOC Partnership Forum - February 02, 2022

The 2022 ECOSOC Partnership Forum on 2 February 2022 focused on "Building back better from the coronavirus disease (COVID-19) while advancing the full implementation of the 2030 Agenda for Sustainable Development".

TPI played a very active role in the Forum: working with our partners, UN DESA, to convene two plenary 'Partnership Exchange' sessions; running a side event with the 2030 Agenda Partnership Accelerator and Partnerships 2030; and launching a specially-recorded podcast, the first in a series on Partnership Pioneers.



Partnership Exchange plenary sessions

- **Experiences from partnering during the COVID-19 pandemic** - The session featured speakers sharing their first-hand experience and lessons learned in building and managing partnerships during the pandemic and how these could be of use when tackling other urgent global challenges such as climate change. The session featured a keynote address from David Nabarro, Former Special Advisor to the UN Secretary-General on the 2030 Agenda for Sustainable Development and Climate Change and WHO Special Envoy on COVID-19 Preparedness and Response
- **Fostering an enabling environment for collaboration** - This session discussed and explored the policies that are needed to support multi-stakeholder partnerships, how to build capacities of stakeholders around partnering practices, how to support organizational change required to partner effectively, while also hearing from UN Resident Coordinator offices about examples and good practices related to partnership platforms as mechanisms for brokering and catalysing new partnerships for SDG implementation.

Side Event: From COVID-19 to climate change: How can we turbo-charge collaboration?

TPI hosted a side event with Partnerships 2030 and the 2030 Agenda Partnership Accelerator. The session featured speakers from the Platform for Multi-Stakeholder Partnerships for Implementing the 2030 Agenda, Climate2025, the 2030 Agenda Partnership Accelerator, and World Vision International. TPI shared insights from the Rapid Partnering for Climate Action programme, which is developing accelerated partnership protocols to support climate action practitioners and their partners in related fields to initiate, implement and iterate climate action partnerships far faster. We heard from those working on climate action partnerships, and those supporting them.



Podcast: Darian Stibbe discussed the role of business as a partner in development, systems leadership and Kenya's innovative SDG Partnership Platform with Arif Neky, serial innovator and partnership pioneer.

Additional outreach

- **Union for International Cancer Control Annual Summit:** In October 2021, TPI moderated a session entitled "*How innovative partnerships can make change happen*", showcasing a number of successful partnerships, including City Cancer Challenge (with whom TPI has worked previously) and drawing out key success factors.
- **Saïd Business School, University of Oxford:** TPI took part in a session on "SDGs and Big Business - Leaders Panel" as part of the Skoll Impact Lab. TPI also curated a careers session for MBA students interested in working cross-sectorally.

- **Transformational Leaders Network:** TPI joined the World Economic Forum, Harvard Business School, UNDP and others in a range of events to promote systems leadership to deliver transformation in food systems.

4.7. Future plans

TPI will continue to provide services and training, build on existing programmes, and develop new major initiatives to scale up our impact.

2030 Agenda Partnership Accelerator

TPI's plans as part of the Partnership Accelerator include:

- Ongoing national partnership workshops and training of trainers, provisionally in Sri Lanka, Thailand and the Maldives,
- The publication of a guide to designing and facilitating partnership training workshops
- The development of a guide to enable UN Resident Coordinator Offices to apply a systematic approach to partnership at national level.

Global Forum for National SDG Advisory Bodies

The secretariat will develop and implement a communications strategy and support its members to contribute to the UN-led review of progress on the SDGs that is taking place in 2023. TPI will also develop and host a new website for the Global Forum.

Green Transition

The quality of the discussions and the value created by the network of climate partnership practitioners sharing approaches has prompted plans for a wider Climate Collaboration programme in 22-23. This will provide direct support to existing climate partnerships, facilitate peer-exchange and build sector practice. We will also explore working with partners to develop guidance on partnerships across the supply chain for businesses addressing Scope 3 emissions. Given recent interest from philanthropy in upscaling support for climate action, we expect there to be increasing complementarity between our Funder Impact and Climate Collaboration workstreams.

Partnering for Philanthropic Impact

Individual support projects

TPI will be continuing ongoing work with Wellcome Trust and a number of other foundations to support their strategy development, fitness for partnering and operationalising partnerships.

Knowledge sharing and peer exchange

- a. The peer exchange 'group' will continue to develop – both bringing on board more participants and deepening the involvement and connections between existing members. The aim is to hold four peer exchange sessions, including one in person. This work is generally funded through additional contributions made in the individual support projects.
- b. Joint events: TPI has submitted a joint proposal (together with three foundations + UNICEF) for a session at the Philanthropy Europe Association and will also look for other opportunities to co-host events within the philanthropy ecosystem – ideally branching out beyond Europe.
- c. Knowledge Sharing: Several articles are already planned for 2023 to share findings from work with foundations to date (namely: Jacobs Foundation, and Porticus)

The Partnering Academy

TPI will develop its thinking around a highly ambitious new initiative: the Partnering Academy. The Academy aims to professionalise and systematize partnering practice at scale by supporting individuals, organisations and partnerships to reach best practice reference standards.

Network of partnering support organisations

As part of our new strategic approach to scaling up our impact, as well as enabling others to provide partnering support as close as possible to their contexts, TPI will be looking into the potential for building a network of partnering support organisations. This mutual support network would provide reciprocal learning opportunities as well as share examples of effective organisational strategies and business models for partnering support organisations. Building the capability of a range of organisations in LMICs to deliver partnership training and services provides TPI with a wide group of Associates to deliver TPI global and regional programmes, while also providing access to partnership support at a sub-national level which TPI itself would never be able to deliver.

5. ADMINISTRATION

5.1. Public benefit

The Trustees have complied with their duty to have due regard to the guidance on public benefit published by the Charity Commission in exercising their powers and duties.

5.2. Financial review

The results of the charity for the year can be seen on page 23.

5.3. Reserves policy

The Partnering Initiative aims to maintain in reserve four months' worth of operating costs (approximately £200k), along with a development budget for creating new cutting-edge programmes or investing in the organisation. As at 30th September 2022, free reserves held were £344,697, which the Trustees deem acceptable.

6. STATEMENT OF TRUSTEES' RESPONSIBILITIES

The Trustees (who are also directors of The Partnering Initiative for the purposes of company law) are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the Trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for the year. In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP 2019 (FRS 102);
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The Trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- there is no relevant audit information of which the charitable company's auditor is unaware; and
- the Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditor is aware of that information.

The Trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

This report has been prepared having taken advantage of the small companies' exemption in the Companies Act 2006.

This report was approved by the Board, 19th June 2023.



**Elizabeth Stuart,
Chair of Trustees**

7. INDEPENDENT AUDITORS' REPORT TO THE MEMBERS OF THE PARTNERING INITIATIVE

7.1. Opinion

We have audited the financial statements of The Partnering Initiative (the 'charitable company') for the year ended 30th September 2022 which comprise the Statement of Financial Activities, the Balance Sheet, the Cash Flow Statement, and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as of 30th September 2022, and of its incoming resources and application of resources, including its income and expenditure (including income from the United Nations and related expenditure), for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

7.2. Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

7.3. Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

7.4. Other information

The trustees are responsible for the other information. The other information comprises the information included in the trustees' annual report, other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

7.5. Opinions on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

- the information given in the trustees' report (incorporating the directors' report) for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the directors' report has been prepared in accordance with applicable legal requirements.

7.6. Matters on which we are required to report by exception

In the light of our knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept, or returns adequate for our audit have not been received from branches not visited by us; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of directors' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit; or
- the trustees were not entitled to prepare the financial statements in accordance with the small companies' regime and take advantage of the small companies' exemptions in preparing the directors' report and from the requirement to prepare a strategic report.

7.7. Responsibilities of trustees

As explained more fully in the trustees' responsibilities statement set out on page 18, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

7.8. Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The specific procedures for this engagement and the extent to which these are capable of detecting irregularities, including fraud are detailed below:

- Enquiry of management and those charged with governance around actual and potential litigation and claims;
- Enquiry of management and those charged with governance to identify any instances of non-compliance with laws and regulations;
- Reviewing minutes of meetings of those charged with governance;
- Reviewing financial statement disclosures and testing to supporting documentation to assess compliance with applicable laws and regulations;
- Performing audit work over the risk of management override of controls, including testing of journal entries and other adjustments for appropriateness, evaluating the business rationale of significant transactions outside the normal course of business and reviewing accounting estimates for bias.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater

regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

7.9. Use of our report

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.



Benjamin Hayes BSc FCA (Senior Statutory Auditor)

20th June 2023

For and on behalf of Wenn Townsend Chartered Accountants, Statutory Auditor

30 St Giles
Oxford
OX1 3LE

8. FINANCIAL STATEMENTS

8.1. Statement of Financial Activities (including Income and Expenditure Account) for the period ended 30th September 2022

		Unrestricted funds 2022	Restricted funds 2022	Total funds 2022	Total funds 2021
		£	£	£	£
Income from:	Note				
Charitable activities	2	852,800	22,139	874,939	849,937
Total income		852,800	22,139	874,939	849,937
Expenditure on:					
Charitable activities	3	769,059	22,139	791,198	812,664
Total expenditure		769,059	22,139	791,198	812,664
Net movement in funds		83,741	-	83,741	37,273
Balances b/f at 1 st October		260,956	-	260,956	223,683
Balances c/f at 30 th September		344,697	-	344,697	260,956

All income and expenditure derive from continuing activities.

The statement of financial activities includes all gains and losses recognised during the year.

The notes, section 8.5, page 26, form part of the financial statements.

8.2. Balance Sheet as at 30th September 2022

	Notes	2022 £	2021 £
Current assets			
Debtors	6	378,206	196,537
Cash at bank and in hand		95,653	136,848
		473,859	333,385
Creditors: falling due within one year	7	(129,162)	(72,429)
Net current assets		344,697	260,956
Net assets		<u>344,697</u>	<u>260,956</u>
Funds:			
Unrestricted funds			
General funds		<u>344,697</u>	<u>260,956</u>

8.3. Board approval

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

The financial statements were approved and authorised for issue by the trustees on June 19th 2023 and signed on their behalf by:



Marta Garcia
Treasurer

The notes, section 8.5, page 26, form part of the financial statements.

8.4. Statement of Cash Flows for the year ended 30th September 2022

	2022 £	2021 £
Reconciliation of net income to net cash flow from operating activities		
Net income for year	83,741	37,273
Decrease / (increase) in debtors	(181,669)	19,030
Increase in creditors	56,733	10,643
Net cash flow from operating activities	(41,195)	66,946
 Net increase / (decrease) in cash and cash equivalents	 (41,195)	 66,946
Cash and cash equivalents at 1st October	136,848	69,902
Cash and cash equivalents at 30th September	<u>95,653</u>	<u>136,848</u>

The notes, section 8.5, page 26, form part of the financial statements.

8.5. Notes forming part of the financial statements for the period ended 30th September 2022

1 Summary of significant accounting policies

a) General information and basis of preparation

The Partnering Initiative is a charitable company limited by guarantee and is incorporated in England. In the event of the charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the charity. The address of the registered office is given in the charity information in these financial statements. The nature of the charity's operations and principal activities are detailed in the Trustees' Report.

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on a going concern basis under the historical cost convention modified to include certain items at fair value. The financial statements are prepared in sterling which is the functional currency of the charity. Monetary amounts in these financial statements are rounded to the nearest pound sterling.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

b) Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

c) Income recognition

All income is included in the Statement of Financial Activities (SoFA) when the charity is legally entitled to the income after any performance conditions have been met, the amount can be measured reliably and it is probable that the income will be received.

The charity receives government grants in respect of the Coronavirus Job Retention Scheme. Income from government and other grants are recognised at fair value when the charity has entitlement after any performance conditions have been met, it is probable that the income will be received and the amount can be measured reliably. If entitlement is not met then these amounts are deferred.

Project grants and service contract fees are included as income where any work involved has been undertaken by the period end date. Any income received in advance is deferred until associated costs are incurred and based on the level of completion of the project.

Gifts in kind donated for distribution are included at valuation and recognised as income when they are distributed to the projects. Gifts donated for resale are included as income when they are sold. Donated facilities are included at the value to the charity where this can be quantified

and a third party is bearing the cost. No amounts are included in the financial statements for services donated by volunteers.

d) Expenditure recognition

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure is recognized where there is a legal or constructive obligation to make payments to third parties, it is probable that the settlement will be required and the amount of the obligation can be measured reliably.

Irrecoverable VAT is charged as an expense against the activity for which expenditure arose.

Fund-raising costs are those incurred in seeking voluntary contributions and do not include the costs of disseminating information in support of the charitable activities. Support costs are those costs incurred directly in support of expenditure on the objects of the charity and include project management. Governance costs are those incurred in connection with administration of the charity and compliance with constitutional and statutory requirements.

e) Foreign currencies

Foreign currency transactions are initially recognised by applying to the foreign currency amount the spot exchange rate between the functional currency and the foreign currency at the date of the transaction.

Monetary assets and liabilities denominated in a foreign currency at the balance sheet date are translated using the closing rate.

f) Employee benefits

When employees have rendered service to the charity, short-term employee benefits to which the employees are entitled are recognised at the undiscounted amount expected to be paid in exchange for that service.

The charity operates a defined contribution plan for the benefit of its employees. Contributions are expensed as they become payable.

g) Debtors and creditors receivable/payable within one year

Debtors and creditors with no stated interest rate and receivable or payable within one year are recorded at transaction price. Any losses arising from impairment are recognised in expenditure.

h) Tax

The charity is an exempt charity within the meaning of Schedule 3 of the Charities Act 2011 and is considered to pass the tests set out in Paragraph 1 Schedule 6 Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes.

i) Going concern

The financial statements have been prepared on a going concern basis as the trustees believe that no material uncertainties exist. The trustees have considered the level of funds held and the expected level of income and expenditure for 12 months from authorizing these financial statements. The trustees have included an assessment of the impact of COVID-19 as part of this assessment. The budgeted income and expenditure is sufficient with the level of reserves for the charity to be able to continue as a going concern.

2 Income from charitable activities

	2022	2021
	£	£
Service contract fees	495,784	302,507
DFID / FCDO (Learning from Consortia)	-	335,113
Other programmes	212,818	85,827
Training courses	166,337	116,241
CJRS Grant	-	5,749
Other income	-	4,500
	874,939	849,937

Total restricted income included in the above is £22,139 (2021: £335,113).

3 Charitable activities

	Direct charitable costs £	Indirect charitable costs £		Total 2022 £	Total 2021 £
		Core organisational*	Governance		
Consultancy	295,263	15,803	-	311,066	385,866
Wages and salaries	286,599	120,611	21,379	428,589	354,882
Travel & accommodation	12,048	5,697	-	17,745	3,884
Rent and rates	-	26,828	-	26,828	18,941
Website & IT costs	2,058	9,780	-	11,838	7,621
Printing, postage & stationery	539	947	-	1,486	461
Telephone	9	1,211	-	1,220	1,478
Bank charges	-	3,817	-	3,817	1,745
Irrecoverable VAT	-	-	-	-	12,736
Insurance	-	1,052	112	1,164	914
General expenses	278	19,150	13	19,441	17,295
Audit fees	-	-	4,073	4,073	3,280
Foreign exchange losses	(26,020)	(8,934)	(1,115)	(36,069)	3,561
	570,774	195,962	24,462	791,198	812,664

*Core organisational costs include all non-programme-attributable costs including administration, policy engagement, new programme research and development, unfunded knowledge product generation, communication and dissemination.

Total restricted expenditure included in the above is £22,139 (2021: £335,113).

4 Trustees' and key management personnel remuneration and expenses

There were no Trustees' remuneration or expenses reimbursed to Trustees during the year (2021: nil).

The total amount of employee benefits received by key management personnel was £218,961 (2021: £216,395). The Trustees consider the charity's key management personnel comprise the Board of Trustees, the Chief Executive, and the senior management team.

5 Staff costs

	2022	2021
	£	£
Wages and salaries	350,627	276,539
Social security costs	33,849	26,751
Pension costs	44,113	51,592
	<u>428,589</u>	<u>354,882</u>

The number of employees whose emoluments as defined for taxation purposes amounted to over £60,000 in the year was as follows:

Number	2022 Number	2021
£60,001 - £70,000	-	1
£90,001 - £100,000	1	-

The average number of employees, calculated on a full-time equivalent basis, analysed by function was:

	2022 Number	2021 Number
Charitable activities	7	6.5
Management and administration of the charity	2	1.5
	<u>9</u>	<u>8</u>

6 Debtors

	2022	2021
	£	£
Grants and fees receivable	279,886	139,752
Prepayments and accrued income	98,301	54,730
Other debtors	19	2,055
	<u>378,206</u>	<u>196,537</u>

7 Creditors: amounts falling due within one year

	2022	2021
	£	£
Trade creditors	51,501	52,082
Accruals and deferred income	49,838	11,759
Other tax and social security	27,823	8,588
	<u>129,162</u>	<u>72,429</u>

8 Restricted funds

Restricted funds relate to funds from GIZ for the Global Forum Project. €42,437 (£36,719) was received in September 2022, with £15k deferred as at 30th September 2022, to be recognised in the following year.

In the prior year, restricted funds related to funds from DFID / FCDO for the Learning from Consortia Programme and were expended in full in the period.

9 Related parties

There were no related party transactions in the current or preceding year.



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Twitter: @TPGlobal
LinkedIn: The Partnering Initiative
Charity number: 1154259

THE PARTNERING INITIATIVE

England & Wales - Charity number 1154259

Accounts

The Partnering Initiative



TRUSTEES' ANNUAL REPORT AND ACCOUNTS 2020-21

1st October 2020 to 30th September 2021

The Partnering Initiative

21B Park End Street, Oxford, OX1 1HU, United Kingdom
England and Wales Charity no: 1154259
England and Wales-registered Company no: 08528402

Trustees' Annual Report

1st October 2020 - 30th September 2021

Legal and administrative information

Trustees

Sean De Cleene
Amanda Gardiner (resigned 30th April 2021)
Thomas Hale
Thomas Lingard (resigned 31st March 2022)
Caron Rohsler (appointed 27th March 2020)
Robert Smith (Chair and Treasurer, resigned 31st March 2022)

Appointed 13th Jan 2022:

James Cole
Marta Garcia (Treasurer)
Katherine Hartley
Marianne Mwaniki
Elizabeth Stuart (Chair)

Chief Executive

Dr Darian Stibbe

Registered Office

21B Park End Street
Oxford OX1 1HU
United Kingdom

Auditors

Wenn Townsend
30 St Giles
Oxford, OX1 3LE, United Kingdom

Bankers

Metro Bank
4-5 Queen Street
Oxford
OX1 1EJ

The trustees, who are also directors of the charity for the purposes of the Companies Act, submit their annual report and the audited financial statements for the year ended 30th September 2021. The trustees have adopted the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities" (FRS 102) in preparing the annual report and financial statements of the charity.

Structure, governance and management

The charity is a charitable company limited by guarantee, set up on 14th May 2013. It is governed by a memorandum and articles of association.

Organisational structure

The Partnering Initiative operates out of a central hub in the UK with a core staff working on programme development and delivery, partner relations and communication. Our development projects, action research, strategic consultancy support and training services are delivered internationally through both core staff and a global network of highly experienced Associates. A key feature of all The Partnering Initiative's activities is the drawing out of cutting-edge knowledge on the theory and practice of partnership which is then disseminated widely through online knowledge exchange and webinars, guidebooks, reports and other publications.

The Partnering Initiative is run by an Executive Director reporting to a multi-sector independent Board.

Key management personnel remuneration

The Trustees consider the Board of Trustees and the senior management team of the Executive Director plus two senior directors as comprising the key management personnel of the charity in charge of directing and controlling the charity and running and operating the charity on a day-to-day basis. All Trustees give their time freely and no Trustee remuneration was paid in the year. Details of Trustee expenses and related party transactions are disclosed in note 4 to the accounts.

Trustees are required to disclose all relevant interests and, in accordance with policy, withdraw from decisions where a conflict of interest arises.

The pay of the Executive Director is reviewed annually by the Trustees to ensure it is commensurate with experience and performance and fair in comparison with similar roles. The pay of the senior directors automatically increases annually by the lower of inflation or two percent and is reviewed annually by the Executive Director to ensure salaries are competitive, fair and commensurate with the role, experience and performance.

Risk management

The Trustees have implemented systems to be followed by Charity staff with a view of ensuring that the risks of financial loss are minimized. Trustees and Charity staff review the appropriateness of these procedures annually and ensure that they are being adhered to. The Trustees have also examined other operational and business risks that might arise and confirmed that they have established systems to mitigate the significant risks. Over the course of the last year, the Trustees have considered the financial risks facing the Charity at every Trustees' meeting.

Objectives and Activities

The Partnering Initiative is a UK-based, globally-operating charity dedicated to **driving effective multi-sector collaboration for a sustainable future.**

TPI's vision and mission

TPI passionately believes in the power of collaboration across societal sectors to leverage complementary resources and unleash the innovation necessary to achieve prosperous, sustainable business and societies. We are working to realize a world in which business, governments, NGOs, international organisations, communities and academia combine their resources through partnership at an unprecedented scale to maximize collective business and societal value and drive sustainable development.

TPI's ambitious mission is to drive the development of the enabling environment, the 'infrastructure' of support, the quality of collaboration, and the competencies necessary to scale up and mainstream effective partnerships for the Sustainable Development Goals (SDGs) globally.

TPI's charitable purpose

The charity is a charitable company limited by guarantee and was set up on 14th May 2013. It is governed by a memorandum and articles of association. TPI's mission is to drive widespread effective cross-sector collaboration for a sustainable future by;

1) Promoting sustainable development for the benefit of the public by:

- Raising awareness and promoting the use of cross sector partnerships globally.
- Building systemic, institutional and individual capacity across all societal sectors to develop and support effective partnerships.
- Directly and indirectly supporting the development and effective delivery of cross sector partnerships globally.
- Promoting and undertaking study and research in cross-sector partnerships and disseminating useful results of such a study to the public at large.
- Supporting the development of an enabling architecture to drive the scaling up of the use of cross sector partnerships globally.

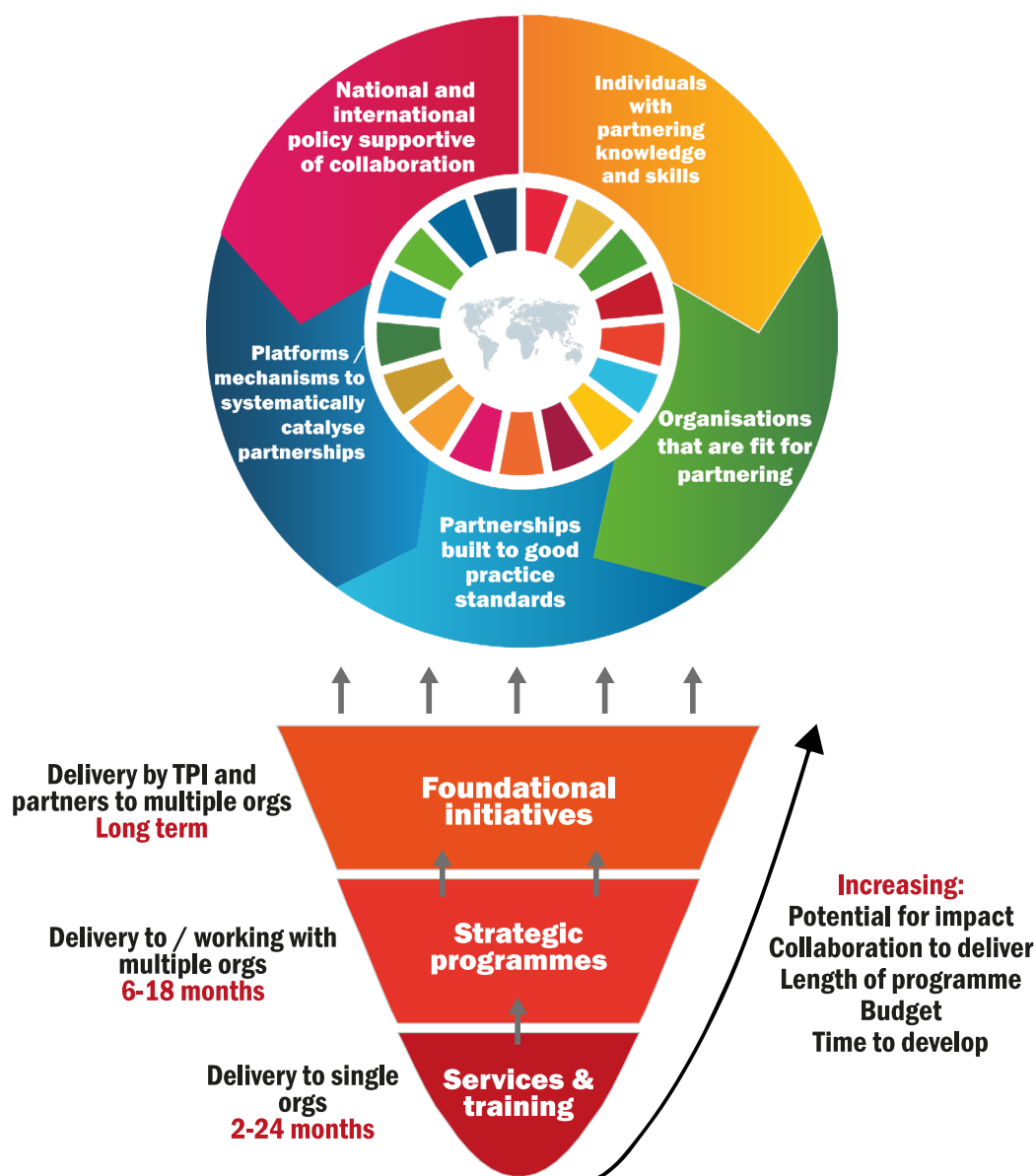
2) Advancing the education of the public in subjects relating to cross sectoral partnerships globally.

Note: Sustainable development is defined as "development which meets the needs of the present without compromising the ability of future generations to meet their own need"

Cross-sector collaboration or partnership is defined as "any combination of public, private, NGO, UN or other bodies working together to achieve common objectives which contribute to sustainable development."

Details of significant activities for achieving objectives

TPI's cutting-edge, holistic approach aims at actualising five key 'building blocks' that must be in place to engage business in development and drive multi-stakeholder partnerships as an essential mechanism towards delivering the Sustainable Development Goals (SDGs).



TPI delivers its mission through a mixed portfolio; i) services and training to individual organisations; ii) strategic collaborative programmes which engage multiple organisations to collectively drive forward the state of the art of partnering in specific areas; iii) foundational initiatives – major programmes delivered collectively with other organisations to build an enabling eco-systems that can deliver partnerships at scale.

Foundational Initiative: Partnership Accelerator for the 2030 Agenda

The [Partnership Accelerator for the 2030 Agenda](#) is a major programme with the United Nations Department of Economic and Social Affairs (UN DESA), along with UN Office for Partnerships (UNOP), UN Global Compact and UN Development Coordination Office. The programme works in two areas:

- Partnership platforms: Supporting effective country-driven multi-stakeholder partnership platforms and mechanisms that can engage business and other



**PARTNERSHIP
ACCELERATOR**
2030 AGENDA
FOR SUSTAINABLE DEVELOPMENT

stakeholders, and catalyse partnerships for the SDGs; drawing out best practices and guidance to assist optimizing emerging platforms; and supporting a new generation of UN Resident Coordinators and country teams.

- Partnership skills and competencies: building capacity of relevant stakeholders to develop and implement partnerships for the SDGs, and to support organizations to develop their policy and strategy, systems and processes, legal agreements, and culture to support collaboration.

Small Islands, Genuine Partnerships



In July 2021 TPI and UN DESA organised a webinar, “Small Islands, Genuine Partnerships” to explore the imperative of multi-stakeholder partnerships in Small Island Developing States (SIDS). The event was held as part of the 2030 Agenda Partnership Accelerator webinar series and a side event to the [2021 High-Level Political Forum](#).

The webinar looked into specific contexts of SIDS impact partnering and introduced a

competency framework and a new SIDS-specific partnership training module (see below). Participants heard how effectively aligning, combining, and optimizing the resources brought by all sectors of society, multi-actor partnerships can maximize the impact of available resources in SIDS.

SIDS-specific partnering module

A new SIDS-specific partnering module, made possible through generous funding support from the Government of Ireland, and building on extensive consultations with SIDS, complements the [SDG Partnership Guidebook](#) and the [SIDS Partnership Toolbox](#). It was launched as part of the webinar “Small Islands, Genuine Partnerships”.

SIDS Partnership Guide

The “[Small Islands, Genuine Partnerships](#)” Partnership Guide was developed by TPI in collaboration with UN DESA, with funding from the Government of Ireland. It is designed to be used together with the [SDG Partnership Guidebook](#), and serves as a starting point for anyone seeking to understand the specific challenges and opportunities of partnering in SIDS.

The material is illustrated by interesting examples of partnerships in practice, followed by actionable guidance.

Advancing partnerships to support the SDGs in Maldives



In November 2020, TPI held a workshop in collaboration with the Republic of Maldives, the UN Maldives Office, and UN DESA to build an understanding of how to scale up multi-stakeholder partnering to achieve the vision of One Maldives working together to deliver the SDGs. The online workshop brought together leaders from across all sectors, to celebrate examples of partnerships that are already delivering towards



the SDGs and discuss approaches to scaling up partnership action in the Maldives.

SDG Partnership Accelerator webinar series

Webinar 1: Is your organization equipped to partner effectively for the SDGs?

In October 2020, TPI along with the UN Division for the SDGs, UN DESA and World Vision, launched the 2030 Agenda Partnership Accelerator webinar series, with an inaugural webinar exploring the challenges – and successes – around becoming institutionally fit for purpose to partner effectively to implement the SDGs. Participants learned about institutional obstacles and challenges that can derail partnering efforts, and built an appreciation of the institutional capacities required for effective collaboration.

The event included speakers from Johnson & Johnson Foundation, Ministry of Planning and Economic Policy, Republic of Costa Rica, and the UN Development Coordination Office.

Webinar 2: Partnership Platforms – national mechanisms for advancing SDG implementation

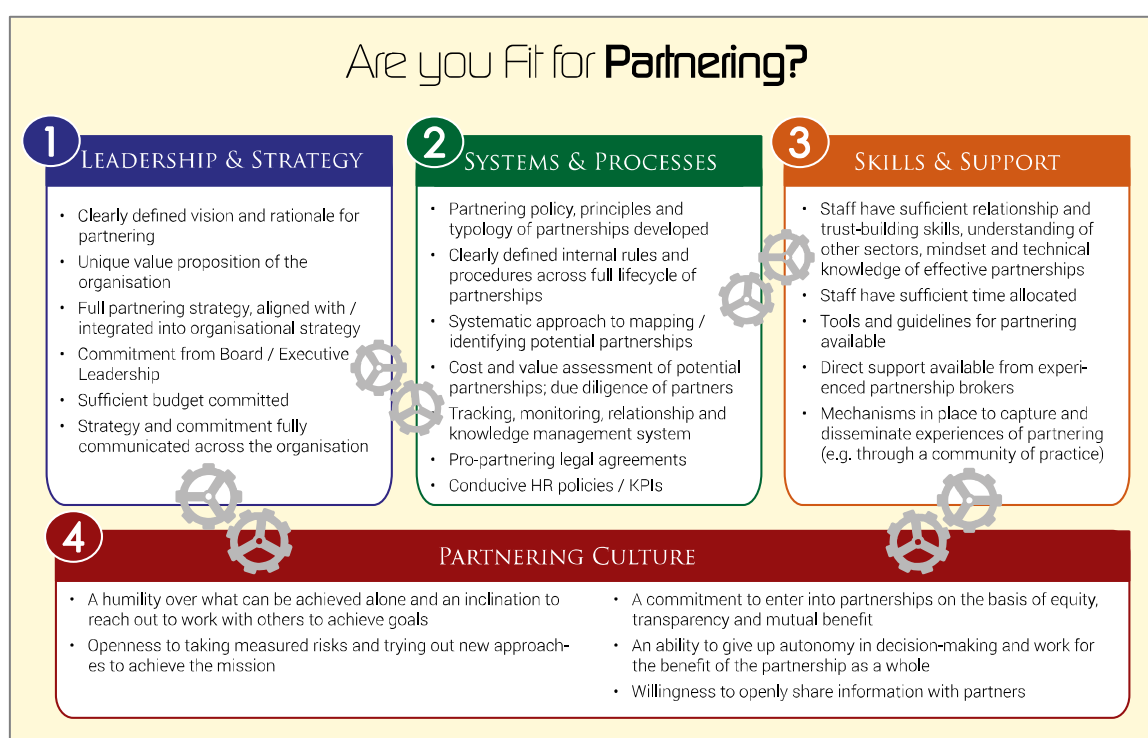
In February 2021, the second webinar of the Global Webinar Series took place with a highly experienced line-up of speakers from Singapore, Mexico, Germany, Kenya and Sri Lanka. The event explored how Partnership platforms are key national mechanisms for generating and brokering new partnerships, providing coherence and coordination among stakeholders, and aligning investments for SDG implementation.

Webinar 3: - Stakeholder engagement and partnerships during and beyond COVID–19

In May 2021, a webinar exploring partnerships during the COVID-19 pandemic was organised in the margins of the 2021 Economic and Social Council (ECOSOC) Partnership Forum and the Multi-stakeholder Forum on Science, Technology and Innovation for the SDGs. The webinar also featured a panel to explore what impact COVID–19 has had on stakeholder engagement, how partnerships have formed a critical response to the pandemic and addressed what lessons can be learned moving forward.

The panel included speakers from Newcastle University, University of Oxford SDGs Kenya Forum, ANTICOV clinical trial, COVID-19 initiatives in Yemen and Mexico, and the Global Partnership for Education.

Fit For Partnering



TPI's framework for assessing and analysing institutional capability to partner, the [Fit for Partnering Framework](#), captures the *institutional* competencies required to partner with excellence, focussing on four elements: Leadership and Strategy, Systems and Processes, People, and Culture.

TPI has continued to work with organisations in assessing and building their institutional capability to partner effectively, through the development of partnering strategies, tools and guidance material, advice on systems and processes and training. (See direct and indirect support section below).

Direct and indirect support

Novo Nordisk

Novo Nordisk engaged TPI to work together to create a partnership development model between the pharmaceutical industry and International Professional Associations (IPAs). This included collecting, analysing and presenting insights into what 'great looks like' between pharmaceutical industry and IPAs, gathered from six IPAs, with insights then used to validate Novo Nordisk's framework and suggest next steps for implementing the model.



The work supported Novo Nordisk in developing guidance on the different forms of partnerships and how they can create value; in co-creating a vision and set of partnering principles to underpin the new partnership framework; and in developing a partnering strategy based on emerging strategic objectives as well as creating guidance for the implementation of the strategy.

CARPHA

TPI was contracted by the Caribbean Public Health Agency (CARPHA) to revise the Corporate and Civil Society Partnering Policy, in order to ensure that it aligns with international best practice, reflects the learned experiences of implementation, and remained relevant to CARPHA's context – in particular, the changing

public health landscape in terms of new public health emergencies such as Ebola, CHIKV, Zika, and COVID-19. Building on previous work in support of CARPHA's partnering capacity, TPI worked with CARPHA to review, update and expand the policy, having identified best practice and optimal structure from a literature review.

TPI developed a user-friendly version of the policy for distribution to current and prospective partners, and made recommendations to enable optimal use of the partnering policy, including external sharing of the policy, internal training and sensitization on the policy, ensuring policy implementation, and complementary tools and guidance. TPI also supported CARPHA to develop improved processes in line with international best practices, CARPHA's Strategic Plan and incorporating learnt experiences of the agency in implementing the policy.

Scaling Up Nutrition Business Network

Evaluation

TPI partnered with Mokoro Ltd to undertake an independent evaluation of the Scaling Up Business Network (SBN), commissioned by the Global Alliance for Improved Nutrition (GAIN). The evaluation, conducted between April and October 2019, served two main objectives: to assess the relevance, internal consistency, and feasibility of SBN's theory of change at the global and national levels; and to assess progress across the impact pathway, from output through to impact level. The theory-based mixed-methods evaluation, which included an extensive review of relevant documentation, and in-depth interviews with more than 100 key role-players. Seven desk study reviews were conducted of SBN in Sri Lanka, Bangladesh, Kenya, Malawi, Tanzania, Nigeria, and Pakistan. Three Case Studies of SBN were conducted in-country in Zambia, Indonesia, and Mozambique. Each of these identified challenges, strengths, and successes towards objectives, and made a set of recommendations

Strategy

TPI supported the SUN Business Network in developing its new strategy for the period 2021-2025. The SBN 3.0 strategy places impact at the country level and leadership by countries front and centre in addressing all forms of malnutrition and supporting actions across nutrition-specific and nutrition-sensitive sectors. Within this context TPI worked with SBN to develop a strategic framework and practical guidance, enabling the national SBN platforms to increase their effectiveness and ultimately their impact. The strategy aligns with and builds on relevant existing information and ongoing processes, such as SUN and SBN policy documents and recent reviews and evaluations.

Case studies

Working closely with colleagues at GAIN and SBN country teams, TPI developed a set of four case studies to draw out learnings and showcase innovative approaches to engaging business for improved nutrition, at National level, through the SBN country networks. The four case studies explored different approaches and types of programmes to illustrate the range of possibilities, and challenges encountered, focusing on initiatives in Kenya, Zambia, Nigeria, Mozambique and Tanzania.

GNDR (Global Network of Civil Society Organisations for Disaster Reduction) 'Evidence and Collaboration for Inclusive Development' support

TPI supported the GNDR to assess the 'collaboration capacities' of 15 Civil Society Organisations – five in each of the three countries (Myanmar, Nigeria, Zimbabwe) supported through the UK's Department for International Development (DFID) funded UK Aid Connect project 'Evidence and Collaboration for Inclusive Development' (ECID). TPI enabled this component by designing and facilitating a light touch, tailored Fit for Partnering assessment of the civil society organisations (CSOs). Analysis of the results fed into the creation of an online partnering training course and coaching for CSO managers, as well as a partnering simulation workshop. TPI also provided a curated set of tools and guidance to support partnerships across the countries.

Strategic programmes and research

Partnerships for Green Growth and the Global Goals (P4G)

In collaboration with our partners Global CAD, TPI continued to support P4G in assessing and selecting partnerships for the P4G Partnership Fund. Global CAD and TPI provided an independent evaluation of

partnerships applying for P4G support through P4G's Call for 2020 and 2021 Partnerships which aim to target significant impact on one or more of P4G's focus SDGs: Zero Hunger (2); Clean Water and Sanitation (6); Affordable and Clean Energy (7); Sustainable Cities and Communities (11); Responsible Consumption and Production (12). This involved supporting the development of application materials, scoring partnership applications and conducting a detailed investment evaluation of finalists for scale-up funding.

In addition, TPI and Global CAD shared strategic and forward-looking recommendations and lessons learned to better shape selection processes in the future. The selection process was redesigned for the 2021 round, building on experience from previous years, and TPI and Global CAD supported the process through expert review of the eligibility and evaluation criteria, supporting P4G teams through checklists and guidance, and scoring and summarizing concept notes and proposals.

In the second half of 2021, P4G commissioned TPI to undertake research on the opportunities and constraints for P4G in the way they can use funding from donors to more effectively support nascent business models. Their current model is to support partners through grants, but they wanted to understand the implications of supporting partners that are, or contain within them, a business model that aims to provide an acceptable risk adjusted rate of return.

Working closely with P4G's Director and team, TPI provided extensive data, examples and analysis that have provided P4G with both conceptual and practical help. The opportunity was also taken to think productively about the role of different partners in addressing the various constraints in the wider market-system that prevent social entrepreneurs from innovating successfully. As a follow-on piece of work, TPI developed a Theory of Change and sample results framework should P4G decide to move in this direction.

Partnering for Philanthropic Impact



Many Foundations are already using – or desire to use – partnering to maximise their impact. As Foundation boards and staff teams grapple with the challenges and opportunities of working more collaboratively – both in their relationships with grantees and, in many cases, in supporting or catalysing new partnerships – there is an opportunity to step back and ensure that a strategic approach is taken.

TPI's new sector report, [Partnering for Philanthropic Impact](#), was launched in 2021 as part of the Partnering for Philanthropic Impact Programme. The report dives into what it means for Foundations to be as strategic as possible in their partnering by understanding which partnership models can deliver their desired impact, and what they need to put in place to make them work.

The report drew on a year of Partnering for Philanthropic Impact inquiry, in collaboration with Johnson & Johnson (J&J) Foundation and Z Zurich Foundation. At the core of the report are four models through which

foundations could deliver greater impact through partnerships: Trusted Partner, Connector, Supporter and Systems Leader. The report set out the advantages and pitfalls of each of the models, as well as the institutional capacities, systems and strategies required to be able to work effectively in each of the different ways.

Learning from Consortia programme



In collaboration with Bond and an Academic Advisory Board, the Learning from Consortia (LFC) programme was an opportunity to support, and learn from, the experiences of UK's Foreign, Commonwealth & Development Office (FCDO) funded consortia.

Through direct support to the consortia, as well as convening learning exchanges, the LFC programme helped to develop an understanding of how international development consortia can function more effectively, paving the way to more impactful consortia in the future.

In May 2021 the FCDO took the decision to close the LFC programme six months early. Nevertheless, with the rich learning that the team had already accumulated, in particular from partnership health checks that had been conducted on twelve of the consortia, TPI wrote a [Guide to emerging thinking and effective practices in consortium working](#). It includes reflection on some of the key challenges a consortium faces as a result of its structure and ambitions; methods for maximising the

consortium's value; guidance on establishing collaborative leadership and governance; and recommendations on how to close or transition a consortium. A [Health Check Report](#) was also published, presenting some over-arching findings on how effectively the consortia were functioning, as well as exploring whether and in what ways the Health Checks helped them. The programme also held a public event – “What can we learn from working in consortia?” – which was attended by more than 100 people from NGOs, institutes, networks and donor organisations.

Mining as a transformational partner in development

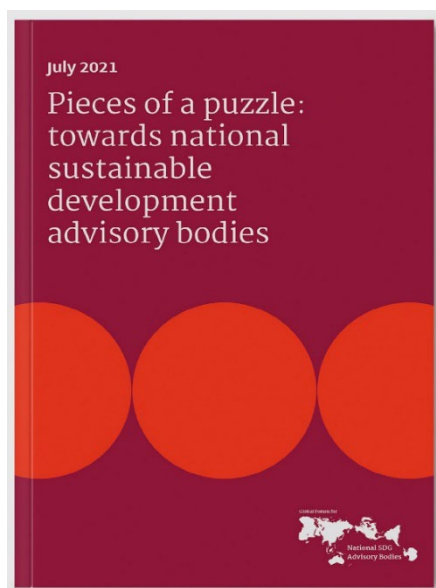
In 2019, TPI worked with the International Council on Mining and Metals (ICMM), Business Fights Poverty and the Corporate Responsibility Initiative at Harvard Kennedy School to explore the collective leadership of the mining and metals industry post-pandemic in the publication [Building Forward Better](#). Partnerships were identified as key to unleashing the unique power of the industry in being able to positively impact communities.

This year, TPI and ICMM produced a new guide to development partnerships for the mining industry, [Partnering for our Common Future: Optimising mining's partnering capability to contribute to community resilience and thriving societies](#). The guide brings together TPI's partnering expertise and ICMM's sustainable development leadership, and provides practical tools and insights to help strengthen the partnering capacity of the mining industry, including a self-assessment tool to help mining companies to understand the degree to which they are currently set up to be institutionally fit for partnering.



Global Forum of SDG Advisory Bodies

The Global Forum, founded during the UN Sustainable Development Summit in 2019, is a network that connects the knowledge and experience of multi-stakeholder advisory commissions, councils and similar bodies for sustainable development. These bodies contribute to the national institutional architectures for the implementation of the SDGs.



TPI was engaged by GIZ to conduct an empirical study on the potential and options for establishing national councils, commissions or similar multi-stakeholder bodies for sustainable development. This was done in two phases, the first study covered Kenya, Benin, Ecuador and Tanzania. A summary of this research was published in July 2021 as “Pieces of a puzzle: towards national sustainable development advisory bodies”.

The second phase started in September 2021 when eight countries were profiled (Costa Rica, Ghana, Nepal, Nigeria, Peru, South Africa, Uganda and Vietnam).

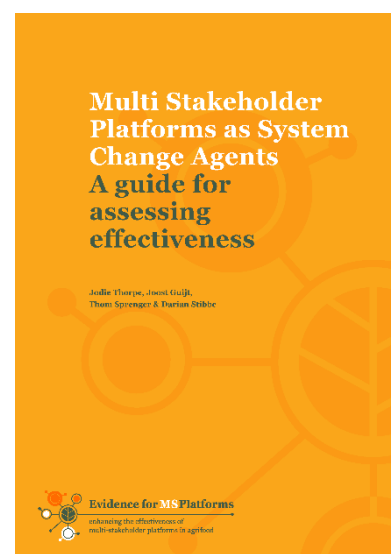
The studies provide a light touch assessment of the institutional environment for the 2030 Agenda, integration of the SDGs in policy and planning, and stakeholder engagement in a Voluntary National

Review (VNR) process or other related activity. The findings of the research reflect how current governance architecture, national sustainable development policy processes and existing stakeholder groups collaborate as well as provide evidence-informed recommendations of how preconditions and stakeholder engagement look like in the different countries.

Guidance Paper: Multi Stakeholder Platforms as System Change Agents

The effectiveness of multi-stakeholder platforms (MSPs) remains poorly understood, particularly in relation to their intended purpose and goals. The relationship between individual MSP activities and intended system level effects is neither simple nor direct. As a result, MSPs focus on tracking what can be measured, rather than reflecting on how MSPs are contributing to system level results.

In collaboration with Wageningen University and Research and the Institute of Development Studies, TPI contributed to a new report titled, [Multi Stakeholder Platforms as System Change Agents – A guide for assessing effectiveness](#). The Guidance Paper set out how MSPs can better use existing and new evidence and processes to assess their system-change role. It was developed from experiences with four agri-food MSPs: Bonsucro; Farm to Market Alliance (FtMA); Scaling Up Nutrition (SUN) Movement; and the Zambia Business in Development Facility (ZBiDF).



The reflections generated were intended to act as a vital input to strategic decision-making by those involved in implementing, brokering and supporting MSPs, as well as donors and other funders.

Outreach

UN & Australia Sustainable Partnerships Forum

In April 2021, TPI was proud to participate in Australia's major SDG event for the year, the Sustainable Partnerships Forum, across two key sessions:

- A practical and interactive session based on global emergent practice in multi-stakeholder partnering for impact – *Are You Fit for Partnering?* The session included a contribution from the National Aboriginal Community Controlled Health Organisation (NACCHO) in Australia, looking at what it means to shift power to communities and address race and racism in and through our partnerships.
- A panel discussion on partnering with the UN – *an international perspective* – with panellists from UN resident coordinator for Samoa, WHO, GHD Digital D-Lab, and the Business Council for Sustainable Development Australia, and moderated and curated by TPI.

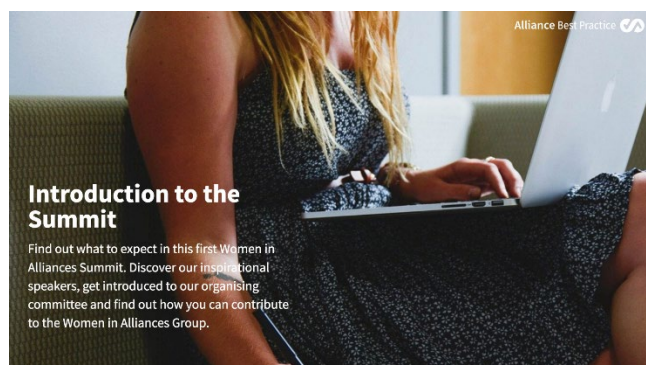
A key outcome of the Forum was the *Manifesto for Partnering for the Sustainable Development Goals*, co-created by participants of the Forum and facilitated by TPI.



Maximising business engagement in the SDGs with the Business and Industry Major Group

In May 2021, TPI was a guest speaker on *"Maximizing the engagement and value of private sector as a partner in sustainable development"* at the Meeting of the Business & Industry Major Group (B&I MG) to the UN in NY.

The presentation focused on private sector engagement for the United Nations 2030 Agenda for Sustainable Development and tapped into the foundation document *Unleashing the power of business: A practical Roadmap to systematically engage business as a partner for the SDGs*. This report was originally launched by TPI in 2017 as an input into the Global Partnership for Effective Development Cooperation (GPEDC) and continues to be a key resource as the need for partnerships is increasingly recognised as crucial to achieving a sustainable future for people and planet.



Women in Alliances 2021 Summit – Launching Alliance Professionals

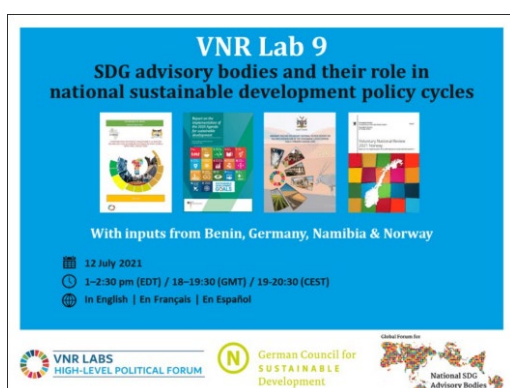
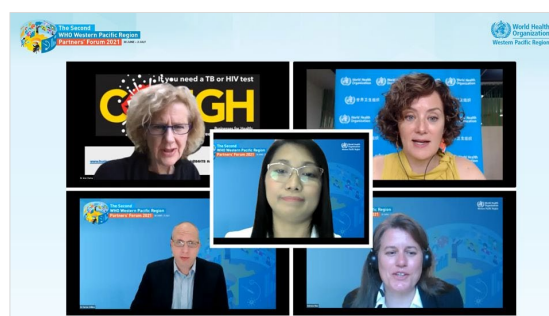
In May 2021, TPI participated in the *Women in Alliances 2021 Summit – Launching Alliance Professionals*, organised by Women in Alliances (WIA). The Summit featured a wide range of experienced and successful female alliance leaders, who shared their challenges and successes in their chosen field of alliance management. In support of the event, TPI ran Breakout Track 3 – Building

partnerships to solve the world's most wicked problems. The interactive session explored how panellists and their organisations are helping to solve some of our world's "most wicked problems" through partnerships

and in doing so they are driving innovation, engaging employees and customers, and creating vast new opportunities and new value for their companies, partners, for society and our planet.

WHO Pacific Region Partners' Forum

In June 2021 TPI joined the Second World Health Organization (WHO) Western Pacific Region Partners' Forum, moderating the session "Health beyond the health sector – innovative partnerships for public health", to discuss the importance of partnering outside of the health sector, sharing expertise built on TPI's experience with many health and non-health partnerships over the past decade.



VNR-Lab 9: SDG advisory bodies and their role in national sustainable development policy cycles

In July 2021, the German Council for Sustainable Development (RNE) and UN DESA hosted a VNR-Lab titled, "SDG advisory bodies and their role in national sustainable development policy cycles" as part of the 2021 High-Level Political Forum (HLPF).

The VNR-Lab debated the importance and various forms of national sustainable development policies, including national strategies, policy cycle, prioritization processes and the use of indicators. It was also an opportunity to discuss Voluntary

National Reviews and peer review processes and how they can relate to the policy cycles at national level. The lab examined the impact of inputs from reviews at the international level on national policies and strategies. During the event, a number of national multi-stakeholder advisory bodies outlined how they work together with their governments to deliver on the 2030 Agenda.

Open and tailored trainings

TPI continued to develop its flagship Building Effective Partnerships for Development training, aimed at individual partnership practitioners, which was delivered this year mainly in the form of virtual tailored trainings for a number of organisations. TPI has made the transition from in-person to online training by combining virtual group sessions with inter-module assignments, to be completed individually or in groups. These assignments are designed to provide space for both individual reflection and the opportunity to take the tools, frameworks and concepts covered in the sessions and apply them to their personal partnering context. Online courses have enabled us to reach a broader audience for whom in-person training may not have been a practical option.

AMEA

Agribusiness Market Ecosystem Alliance (AMEA) is a global network for 'accelerating the professionalisation of farmer organisations'. To support partnership development and network building capabilities, TPI designed and delivered online partnering trainings over two months for three successive cohorts of regional facilitators and local network members.

Africa One Health University Network (AFROHUN)

TPI delivered a series of five online partnering training sessions to AFROHUN, a network of 18 universities and institutions across nine African countries focusing on healthcare. The training was delivered to University and Institutional professionals and was developed as part of the USAID-funded One Health Workforce project, focusing on developing a workforce without disciplinary barriers, for more effective pandemic preparedness and response. Over 50% of training participants went on to complete TPI's Certificate in Partnering Practice.

Ethical Tea Partnership

TPI developed a tailored, online version of its partnerships for development training, offering a course of six virtual seminars to senior regional managers and partnership managers from the Ethical Tea Partnership who are involved in designing, leading or facilitating multi-stakeholder partnerships.

GNDR Capacity Building

As part of its wider project supporting GNDR's partnering capacity, (see direct and indirect support to partnerships section above) TPI developed an online training and coaching programme for senior managers from 15 CSOs supported through the UK Aid Connect project 'Evidence and Collaboration for Inclusive Development'. The course content was informed by the collaboration assessment TPI conducted for GNDR in an earlier part of the programme.

Send a Cow

Partnerships were identified as a priority for the next decade within Send a Cow, a non-profit working with smallholder farmers in six African countries, supporting gender and social inclusion, business skills, and improved farming techniques. A comprehensive new guidebook and set of tools were developed, and TPI supported Send a Cow to roll these out across the organisation through a partnership capability building training and action planning workshop designed to build common partnering skills and understanding, develop and support a group of partnership focal points as partnering champions, and develop action plans for each of SAC's focus countries.

UNSSC

TPI has continued to design and deliver tailored trainings as part of its longstanding collaboration with the UN Systems Staff College (UNSSC), supporting their partnership building initiatives. In the last year, this included a developing a partnership building virtual workshop as part of the UN Secretariat Executive Management Programme with the UNSSC Knowledge Centre for Leadership and Management; developing sessions on "Partnering and Positioning: FAO in a multi-stakeholder environment" for three separate cohorts of 30 Food and Agriculture Organization of the United Nations (FAO) participants (part of Building Capacity for Change: a leadership development initiative for FAO National Professional Officers); and designing learning materials on 2030 Agenda Partnerships, for the Partnership Module in the UN Resident Coordinators Office (RCO) Learning Path programme, a blended learning programme for RCO staff.

Future plans

2030 Agenda Partnership Accelerator

With our partners, UN DESA, we will continue to roll out the Partnership Accelerator to new countries, as well as build a cohort of partnership champions in the Caribbean who can multiply the impact through themselves delivering training in their respective countries.

Training

TPI will continue to provide tailored training, both in person and online, and in 2022 TPI will offer its first Open Online Training, available to all partnering professionals. In providing online training TPI can broaden the reach of its training programmes to those for whom in person training in Oxford may not be an attainable option, including those in remote or developing countries, providing all participants with the opportunity to learn from, and share experiences with, a diverse and interesting group of participants.

P4G

TPI will continue its partnership with P4G by working with partners GlobalCAD to provide an independent assessment of applicants to P4G's 2022 Call for Proposals over two assessment cycles in 2022. TPI and GlobalCAD will assess applications which aim to target significant impact on one or more of P4G's five SDG's: Zero Hunger (2); Clean Water and Sanitation (6); Affordable and Clean Energy (7); Sustainable Cities and Communities (11); Responsible Consumption and Production (12).

Green Transition

TPI has secured seed funding to support the inquiry phase of the *Rapid Partnering for Climate Action programme*. In the run-up to COP26 in November 2021, TPI will work with Partnerships 2030 and a small group of climate practitioners to develop a new accelerated partnership protocol that will support partners to initiate, implement and iterate climate action partnerships far faster.

Development priorities for the wider Green Transition portfolio include growing TPI's reputation and credibility as a green partnerships resource, cultivating links with emerging and established climate and environmental partnerships that may benefit from TPI's support, and continuing to grow relationships with strategic partner organisations.

Partnering for Philanthropic Impact

Building on the enquiry phase of the Partnering for Philanthropic Impact programme, the programme will continue to evolve during 2021-22. The programme has three interconnected strands: (1) Individual programmes of support with philanthropic organisations to support their partnership approaches, while drawing out learning for the wider sector; (2) knowledge exchange to allow philanthropic organisations to learn from each other and share experiences; and (3) sector practice development through research, design, testing, and dissemination of new approaches for philanthropy-supported and led transformational partnerships.

The first strand is already in progress, with ongoing projects in support of Jacobs Foundation, J&J Foundation, and Children's Investment Fund Foundation and several others in the pipeline. The second and third strands are still in development, as we reach out to foundations and others in the philanthropic sector to partner with on this work.

Administration

Public Benefit

The Trustees have complied with their duty to have due regard to the guidance on public benefit published by the Charity Commission in exercising their powers and duties.

Financial review

The results of the charity for the year can be seen on page 21.

Reserves policy

TPI aims to maintain in reserve a minimum of four months' worth of operating costs, along with a development budget for creating new cutting-edge programmes. Target reserves are six months of operating cost, or approximately £240,000. As of 30th September 2021, free reserves held were £260,956, which the Trustees deem acceptable.

Statement of trustees' responsibilities

The Trustees (who are also directors of The Partnering Initiative for the purposes of company law) are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the Trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for the year. In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP 2019 (FRS 102);
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The Trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- there is no relevant audit information of which the charitable company's auditor is unaware; and
- the Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditor is aware of that information.

The Trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

This report has been prepared having taken advantage of the small companies' exemption in the Companies Act 2006.

This report was approved by the Board 20th June 2022.



Elizabeth Stuart,
Chair of Trustees

Independent auditors' report to the members of The Partnering Initiative

Opinion

We have audited the financial statements of The Partnering Initiative (the 'charitable company') for the year ended 30th September 2021 which comprise the Statement of Financial Activities, the Balance Sheet, the Cash Flow Statement, and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as of 30th September 2021, and of its incoming resources and application of resources, including its income and expenditure (including income from the United Nations and related expenditure), for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The trustees are responsible for the other information. The other information comprises the information included in the trustees' annual report, other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we

identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Opinions on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

- the information given in the trustees' report (incorporating the directors' report) for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the directors' report has been prepared in accordance with applicable legal requirements.

Matters on which we are required to report by exception

In the light of our knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept, or returns adequate for our audit have not been received from branches not visited by us; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of directors' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit; or
- the trustees were not entitled to prepare the financial statements in accordance with the small companies' regime and take advantage of the small companies' exemptions in preparing the directors' report and from the requirement to prepare a strategic report.

Responsibilities of trustees

As explained more fully in the trustees' responsibilities statement set out on page 17, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists.

Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The specific procedures for this engagement and the extent to which these are capable of detecting irregularities, including fraud are detailed below:

- Enquiry of management and those charged with governance around actual and potential litigation and claims;
- Enquiry of management and those charged with governance to identify any instances of non-compliance with laws and regulations;
- Reviewing minutes of meetings of those charged with governance;
- Reviewing financial statement disclosures and testing to supporting documentation to assess compliance with applicable laws and regulations;
- Performing audit work over the risk of management override of controls, including testing of journal entries and other adjustments for appropriateness, evaluating the business rationale of significant transactions outside the normal course of business and reviewing accounting estimates for bias.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of our report

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.



Benjamin Hayes BSc FCA (Senior Statutory Auditor)

For and on behalf of Wenn Townsend Chartered Accountants, Statutory Auditor

30 St Giles
Oxford
OX1 3LE

Statement of Financial Activities (including Income and Expenditure Account) for the period ended 30th September 2021

		Unrestricted funds 2021 £	Restricted funds 2021 £	Total funds 2021 £	Total funds 2020 £
Income from:	Note				
Charitable activities	2	514,824	335,113	849,937	736,383
Total income		514,824	335,113	849,937	736,383
Expenditure on:					
Charitable activities	3	477,551	335,113	812,664	689,269
Total expenditure		477,551	335,113	812,664	689,269
Net movement in funds		37,273	-	37,273	47,114
Balances b/f at 1 st October 2020		223,683	-	223,683	176,569
Balances c/f at 30 th September 2021		260,956	-	260,956	223,683

All income and expenditure derive from continuing activities.

The statement of financial activities includes all gains and losses recognised during the year.

Balance Sheet as at 30th September 2021

	Notes	2021 £	2020 £
Current assets			
Debtors	6	196,537	215,567
Cash at bank and in hand		136,848	69,902
		<u>333,385</u>	<u>285,469</u>
Creditors: amounts falling due within one year	7	(72,429)	(61,786)
		<u>260,956</u>	<u>223,683</u>
Net current assets		260,956	223,683
Net assets		<u>260,956</u>	<u>223,683</u>
Funds:			
Unrestricted funds			
General funds		<u>260,956</u>	<u>223,683</u>

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

The financial statements were approved and authorised for issue by the trustees on 20th June and signed on their behalf by:



Marta Garcia
Treasurer

Statement of Cash Flows for the year ended 30th September 2021

	2021 £	2020 £
Reconciliation of net income to net cash flow from operating activities		
Net income for year	37,273	47,114
Decrease / (increase) in debtors	19,030	(83,175)
Increase in creditors	10,643	2,322
Net cash flow from operating activities	<u>66,946</u>	<u>(33,739)</u>
Net increase / (decrease) in cash and cash equivalents	<u>66,946</u>	<u>(33,739)</u>
Cash and cash equivalents at 1st October 2020	<u>69,902</u>	<u>103,641</u>
Cash and cash equivalents at 30th September 2021	<u><u>136,848</u></u>	<u><u>69,902</u></u>

Notes forming part of the financial statements for the period ended 30th September 2021

1 Summary of significant accounting policies

a) General information and basis of preparation

The Partnering Initiative is a charitable company limited by guarantee and is incorporated in England. In the event of the charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the charity. The address of the registered office is given in the charity information in these financial statements. The nature of the charity's operations and principal activities are detailed in the Trustees' Report.

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland issued in October 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on a going concern basis under the historical cost convention modified to include certain items at fair value. The financial statements are prepared in sterling which is the functional currency of the charity. Monetary amounts in these financial statements are rounded to the nearest pound sterling.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

b) Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

c) Income recognition

All income is included in the Statement of Financial Activities (SoFA) when the charity is legally entitled to the income after any performance conditions have been met, the amount can be measured reliably and it is probable that the income will be received.

The charity receives government grants in respect of the Coronavirus Job Retention Scheme. Income from government and other grants are recognised at fair value when the charity has entitlement after any performance conditions have been met, it is probable that the income will be received and the amount can be measured reliably. If entitlement is not met then these amounts are deferred.

Project grants and service contract fees are included as income where any work involved has been undertaken by the period end date. Any income received in advance is deferred until associated costs are incurred and based on the level of completion of the project.

Gifts in kind donated for distribution are included at valuation and recognised as income when they are distributed to the projects. Gifts donated for resale are included as income when they are sold. Donated facilities are included at the value to the charity where this can be quantified and a third party is bearing the cost. No amounts are included in the financial statements for services donated by volunteers..

d) Expenditure recognition

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure is recognized where there is a legal or constructive obligation to make payments to third parties, it is probable that the settlement will be required and the amount of the obligation can be measured reliably.

Irrecoverable VAT is charged as an expense against the activity for which expenditure arose.

Fund-raising costs are those incurred in seeking voluntary contributions and do not include the costs of disseminating information in support of the charitable activities. Support costs are those costs incurred directly in support of expenditure on the objects of the charity and include project management. Governance costs are those incurred in connection with administration of the charity and compliance with constitutional and statutory requirements.

e) Foreign currencies

Foreign currency transactions are initially recognised by applying to the foreign currency amount the spot exchange rate between the functional currency and the foreign currency at the date of the transaction.

Monetary assets and liabilities denominated in a foreign currency at the balance sheet date are translated using the closing rate.

f) Employee benefits

When employees have rendered service to the charity, short-term employee benefits to which the employees are entitled are recognised at the undiscounted amount expected to be paid in exchange for that service.

The charity operates a defined contribution plan for the benefit of its employees. Contributions are expensed as they become payable.

g) Debtors and creditors receivable/payable within one year

Debtors and creditors with no stated interest rate and receivable or payable within one year are recorded at transaction price. Any losses arising from impairment are recognised in expenditure.

h) Tax

The charity is an exempt charity within the meaning of schedule 3 of the Charities Act 2011 and is considered to pass the tests set out in Paragraph 1 Schedule 6 Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes.

i) Going concern

The financial statements have been prepared on a going concern basis as the trustees believe that no material uncertainties exist. The trustees have considered the level of funds held and the expected level of income and expenditure for 12 months from authorizing these financial statements. The trustees have included an assessment of the impact of COVID-19 as part of this assessment. The budgeted income and expenditure is sufficient with the level of reserves for the charity to be able to continue as a going concern.

2 Income from charitable activities

	2021	2020
	£	£
Service contract fees	302,507	423,102
DFID / FCDO (Learning from Consortia)	335,113	111,849
Other programmes	85,827	136,647
Training courses	116,241	54,083
CJRS Grant	5,749	10,702
Other income	4,500	-
	<u>849,937</u>	<u>736,383</u>

3 Charitable activities

	Direct charitable costs £	Indirect charitable costs £		Total 2021 £	Total 2020 £
		Core organisational*	Governance		
Consultancy	371,358	14,508	-	385,866	312,594
Wages and salaries	252,812	81,755	20,315	354,882	293,372
Travel & accommodation	966	2,918	-	3,884	19,879
Rent and rates	-	18,941	-	18,941	15,886
Website & IT costs	3,493	4,128	-	7,621	3,129
Printing, postage & stationary	-	461	-	461	1,024
Telephone	10	1,468	-	1,478	2,924
Bank charges	-	1,745	-	1,745	1,846
Irrecoverable VAT	-	12,736	-	12,736	4,666
Insurance	-	625	289	914	862
General expenses	1,816	15,466	13	17,295	10,458
Audit fees	-	-	3,280	3,280	2,935
Foreign exchange losses	-	3,561	-	3,561	19,694
	630,455	158,312	23,897	812,664	689,269

*Core organisational costs include all non-programme-attributable costs including administration, policy engagement, new programme research and development, unfunded knowledge product generation, communication and dissemination.

4 Trustees' and key management personnel remuneration and expenses

There was no Trustees' remuneration or expenses reimbursed to Trustees during the year (2020: nil) for their role as Trustees.

The total amount of employee benefits received by key management personnel is £216,395 (2020: £107,512). The Trust considers its key management personnel comprise the Board of Trustees, the Chief Executive, and the senior management team.

5 Staff costs

	2021 £	2020 £
Wages and salaries	276,539	248,038
Social security costs	26,751	24,061
Pension costs	51,592	21,273
	<u>354,882</u>	<u>293,372</u>

The number of employees whose emoluments as defined for taxation purposes amounted to over £60,000 in the year was as follows:

	2021 Number	2020 Number
£60,001 - £70,000	1	-
£80,001 - £90,000	=	<u>1</u>

The average number of employees, calculated on a full-time equivalent basis, analysed by function was:

	2021 Number	2020 Number
Charitable activities	6.5	5
Management and administration of the charity	1.5	1
	<u>8</u>	<u>6</u>

6 Debtors

	2021 £	2020 £
Grants and fees receivable	139,752	169,743
Prepayments and accrued income	54,730	45,805
Other debtors	2,055	19
	<u>196,537</u>	<u>215,567</u>

7 Creditors: amounts falling due within one year

	2021 £	2020 £
Trade creditors	52,082	33,212
Accruals and deferred income	11,759	21,755
Other tax and social security	8,588	6,819
	<u>72,429</u>	<u>61,786</u>

8 Restricted funds

Restricted funds relate to funds from DFID / FCDO for the Learning from Consortia Programme.

9 Related Parties

There were no related party transactions in the current or preceding year.

THE PARTNERING INITIATIVE

England & Wales - Charity number 1154259

Accounts

The Partnering Initiative



TRUSTEES' ANNUAL REPORT AND ACCOUNTS 2019-2020

1st October 2019 to 30th September 2020

The Partnering Initiative

21B Park End Street, Oxford, OX1 1HU, United Kingdom
England and Wales Charity no: 1154259
England and Wales-registered Company no: 08528402

Trustees' Annual Report

1st October 2019 - 30th September 2020

Legal and administrative information

Trustees

Mr S De Cleene
Mrs A Gardiner (resigned 30/4/2021)
Mr T Hale
Mr T Lingard
Ms C Rohsler (appointed 27th March 2020)
Mr R Smith (Chair)

Chief Executive

Dr Darian Stibbe

Company Secretary

Dr Darian Stibbe

Registered Office

21B Park End Street
Oxford OX1 1HU
United Kingdom

Auditors

Wenn Townsend
30 St Giles
Oxford, OX1 3LE, United Kingdom

Bankers

Royal Bank of Scotland
32 St Giles
Oxford, OX1 3ND, United Kingdom

The trustees, who are also directors of the charity for the purposes of the Companies Act, submit their annual report and the audited financial statements for the year ended 30th September 2020. The trustees have adopted the provisions of the Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities" (FRS 102) in preparing the annual report and financial statements of the charity.

Foreword

While this annual report covers a single year, October 2019 to September 2020, it straddles two completely different worlds.

In the first half year, TPI was engaged as usual on a wide range of projects. In Nairobi, we conducted the first in what was planned to be a major series of national workshops as part of our programme with the United Nations, the Partnership Accelerator for the 2030 Agenda. We were completing our support to the Global Sanitation and Water for All (SWA) Partnership to develop a new 10-year strategy, culminating in a two-day retreat with the SWA steering committee in Hanoi. We had just begun working with Water.Org to help build the organisation up to become institutionally fit for partnering.

Then COVID-19 hit. From March 2020 onwards, the value of partnership, and the resilience of TPI as an organisation, were placed in the spotlight many times over. Several of the projects we were working with ground to an immediate halt. Frequent disruptions in the core team – including several staff members contracting COVID-19, staff furlough, and new colleagues joining without the chance to meet the team in person – meant intensive work to ensure continuity of operations.

COVID-19 led to an immediate step-change in our use of collaborative technology. Within a few months, we had completely re-designed our in-person training programmes, honed over 15 years, into online, facilitated training. For the Partnership Accelerator, we pivoted quickly away from the planned national workshops and found new ways to work together including webinars that engaged over a thousand people around the world. We also brought forward the launch of a seminal new partnering resource developed with the United Nations – the SDG Partnership Guidebook – to help fulfil the urgent need for guidance for COVID-19 partnerships. We also redesigned a major new programme with the FCDO and Bond, Learning from Consortia, and launched it in the middle of COVID-19 chaos.

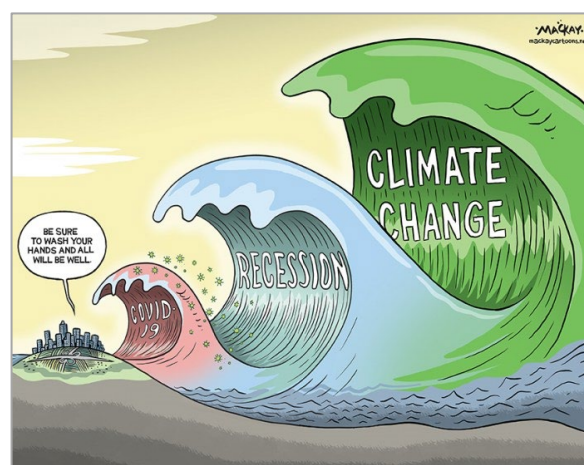
With our network of associates and partner organisations around the world, we launched a COVID-19 response programme, both supporting COVID-19 action partnerships, as well as undertaking research to examine partnering in COVID-19 times. What we found was fascinating. In part due to the urgency and immediacy of the threat, partnerships were forged at pace and at a scale unseen before. All societal sectors, and at all levels, from community up to multi-national, took action and worked effectively together against the common foe.

There are bigger challenges than COVID-19 yet to come, namely the disaster of climate breakdown. We will need to foster and support collaboration in all sectors of society to respond effectively, at scale and at speed. TPI's mission has never been more relevant.

The Trustees join me in thanking our Executive Director, Darian Stibbe, and all TPI staff and Associates for their devotion and hard work in successfully navigating this most difficult of years.



Robert Smith, Chair of Trustees
December 2020



<https://mackaycartoons.net/2020/03/18/wednesday-march-11-2020/>

Structure, governance and management

The charity is a charitable company limited by guarantee, set up on 14th May 2013. It is governed by a memorandum and articles of association.

Organisational structure

The Partnering Initiative operates out of a central hub in the UK with a core staff working on programme development and delivery, partner relations and communication. Our development projects, action research, strategic consultancy support and training services are delivered internationally through both core staff and a global network of highly experienced Associates. A key feature of all The Partnering Initiative's activities is the drawing out of cutting-edge knowledge on the theory and practice of partnership which is then disseminated widely through online knowledge exchange and webinars, guidebooks, reports and other publications.

The Partnering Initiative is run by an Executive Director reporting to a multi-sector independent Board.

Key management personnel remuneration

The Trustees consider the Board of Trustees and the Executive Director as comprising the key management personnel of the charity in charge of directing and controlling the charity and running and operating the charity on a day-to-day basis. All Trustees give of their time freely and no Trustee remuneration was paid in the year. Details of Trustee expenses and related party transactions are disclosed in note 5 to the accounts.

Trustees are required to disclose all relevant interests and in accordance with the Trust's policy withdraw from decisions where a conflict of interest arises.

The pay of the Executive Director is reviewed annually and is normally increased in accordance with average earnings. The remuneration is reviewed to ensure that it is fair and not out of line with similar roles.

Risk management

The Trustees have implemented systems to be followed by Charity staff with a view of ensuring that the risks of financial loss are minimized. Trustees and Charity staff review the appropriateness of these procedures annually and ensure that they are being adhered to. The Trustees have also examined other operational and business risks that might arise and confirm that they have established systems to mitigate the significant risks. Over the course of the last year, the Trustees have considered the financial risks facing the Charity at every Trustees' meeting.

Objectives and Activities

The Partnering Initiative is a UK-based, globally-operating charity dedicated to **driving effective cross-sector collaboration for a sustainable future.**

TPI's vision and mission

TPI passionately believes in the power of collaboration across societal sectors to leverage complementary resources and unleash the innovation necessary to achieve prosperous, sustainable business and societies. We are working to realize a world in which business, governments, NGOs, international organisations, communities and academia combine their resources through partnership at an unprecedented scale to maximize collective business and societal value and drive sustainable development.

TPI's ambitious mission is to drive the development of the enabling environment, the 'infrastructure' of support, the quality of collaboration, and the competencies necessary to scale up and mainstream effective partnerships for the Sustainable Development Goals (SDGs) globally.

TPI's charitable purpose

The charity is a charitable company limited by guarantee and was set up on 14th May 2013. It is governed by a memorandum and articles of association. TPI's mission is to drive widespread effective cross-sector collaboration for a sustainable future by;

1) Promoting sustainable development for the benefit of the public by:

- Raising awareness and promoting the use of cross sector partnerships globally.
- Building systemic, institutional and individual capacity across all societal sectors to develop and support effective partnerships.
- Directly and indirectly supporting the development and effective delivery of cross sector partnerships globally.
- Promoting and undertaking study and research in cross-sector partnerships and disseminating useful results of such a study to the public at large.
- Supporting the development of an enabling architecture to drive the scaling up of the use of cross sector partnerships globally.

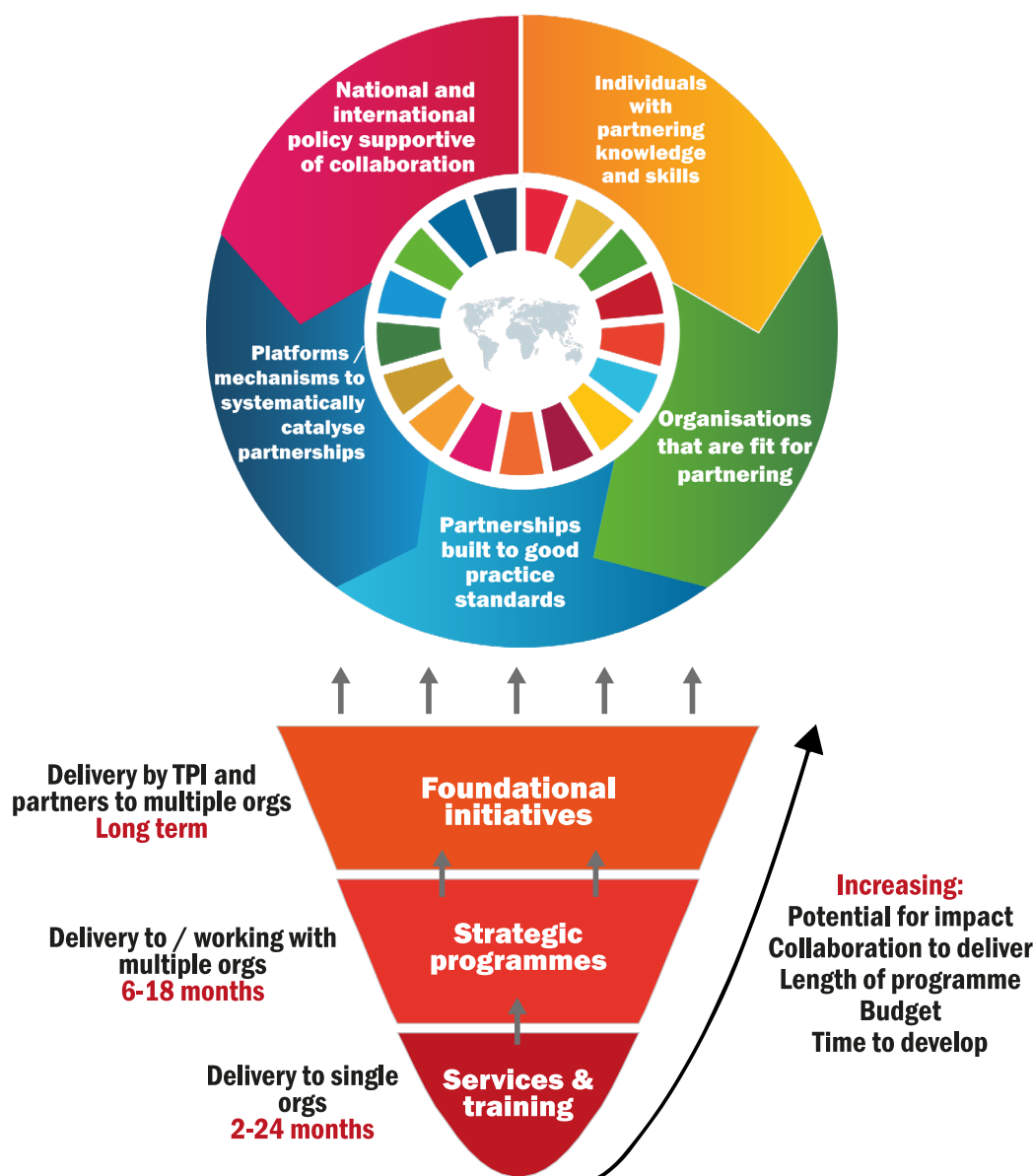
2) Advancing the education of the public in subjects relating to cross sectoral partnerships globally.

Note: Sustainable development is defined as “development which meets the needs of the present without compromising the ability of future generations to meet their own need”

Cross-sector collaboration or partnership is defined as “any combination of public, private, NGO, UN or bodies working together to achieve common objectives which contribute to sustainable development.”

Details of significant activities for achieving objectives

TPI's cutting-edge, holistic approach aims at actualising five key 'building blocks' that must be in place to engage business in development and drive multi-stakeholder partnerships as an essential mechanism towards delivering the SDGs.



TPI delivers its mission through a mixed portfolio; i) services and training to individual organisations; ii) strategic collaborative programmes which engage multiple organisations to collectively drive forward the state of the art of partnering; iii) foundational initiatives – major programmes delivered collectively with other organisations to deliver at scale over a longer period of time.

Foundational Initiative: Partnership Accelerator for the 2030 Agenda

The [Partnership Accelerator for the 2030 Agenda](#) is a major programme with the United Nations Department of Economic and Social Affairs (UN DESA), along with UN Office for Partnerships (UNOP), UN Global Compact and UN Development Coordination Office. The programme aims to:

- Support effective country-driven partnership platforms for SDGs: research and direct support of effective multi-stakeholder partnership platforms and



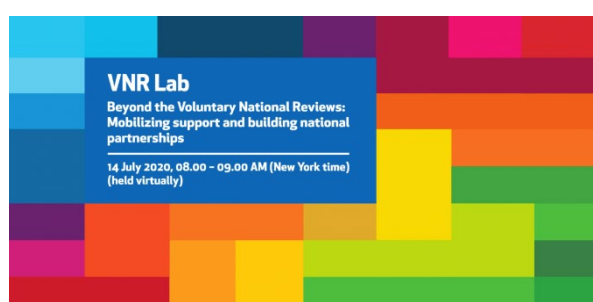
**PARTNERSHIP
ACCELERATOR**
2030 AGENDA
FOR SUSTAINABLE DEVELOPMENT

mechanisms for engaging business and other stakeholders, and catalysing partnerships for the SDGs at national and global level; drawing out best practices and guidance to assist optimizing emerging platforms; and supporting a new generation of UN Resident Coordinators and country teams.

- Build partnership skills and competencies: building capacity of relevant stakeholders to develop and implement partnerships for the SDGs, and to support organizations to develop their policy and strategy, systems and processes, legal agreements and culture to support collaboration.

UN High Level Political Forum

The meeting of the [United Nations' High-level Political Forum \(HLPF\)](#) on sustainable development was held virtually in July 2020. The HLPF annual meeting is the core UN platform for follow-up and review of the 2030 Agenda for Sustainable Development. It featured voluntary national reviews (VNRs) of SDG progress by 47 countries. 'VNR Labs' at the HLPF provide an informal platform to share best practices and reflect on cross-cutting themes and country experiences.



TPI moderated the VNR Lab “**Beyond the Voluntary National Reviews: mobilizing support and building national partnerships**” that explored and showcased practices on how countries can systematically catalyse national multi-stakeholder partnerships for the SDGs. The Lab also explored how countries are working to create an enabling environment that may encourage and foster collaboration across stakeholders.

As part of the 2020 SDG Learning, Training and Practice series linked to the HLPF, TPI [moderated a session on developing transformational partnerships towards the SDGs](#). This capacity building and knowledge workshop was organized by TPI together with the UN Department of Economic and Social Affairs (Division for Sustainable Development Goals, UN Office for Sustainable Development), UN Office on Drugs and Crime, and the World Economic Forum. The training provided an introduction to how multi-stakeholder partnerships can facilitate system transformation by examining how the SDGs exist within complex systems.



TPI also moderated a [multi-stakeholder panel discussion focussed on partnerships against COVID-19 – building back better together to advance the 2030 Agenda](#). The side event looked at examples of partnerships formed to tackle COVID-19, explored how the urgency of the crisis changed the way of forming cross-sector partnerships and asked how governments can foster an enabling environment and policy frameworks supporting effective and rapid partnerships. Finally it looked at how these partnerships can promote synergies between key sectors, including the scientific and technological community and the private sector.

Partnership Accelerator national training workshops

In December 2019, TPI delivered the first [Partnership Accelerator](#) training workshop at the UN Complex in Nairobi, Kenya. The workshop was convened by the SDG Partnership Platform in association with the UN Resident Coordinator's Office and brought together over thirty participants from business, government, civil society and the UN system. Kenya was chosen as the ideal context to launch this pilot workshop due to the

high concentration of partnering activity in the country, combined with the presence of the well-connected SDG Partnership Platform. In addition to offering common tools and frameworks, and, crucially, a shared language and common approach to partnering, the workshop provided additional momentum and energy to several existing partnerships and helped to strengthen the network of in-country partnership champions.

The SDG Partnership Guidebook

The 2020 UN High Level Political Forum also marked the **official launch of the SDG Partnership Guidebook**. The Guidebook is the flagship publication of the **Partnership Accelerator for the 2030 Agenda** and serves as a practical guide to building high impact multi-stakeholder partnerships for the Sustainable Development Goals.

The Guidebook aims to convey the magic of how multi-stakeholder partnerships at country level can deliver significantly towards the SDGs and provide guidance on how to build robust, effective collaborations that can achieve extraordinary results. It sets out the Building Blocks of successful partnerships and the underlying processes necessary to maximise partnership impact. Features include:

- Frameworks to help organisations understand, identify and select the most appropriate forms of collaboration,
- A series of tools that support organisations through each step of partnership development and management,
- Guidance on the more in-depth, trickier, but essential, partnering aspects – including trust, power imbalances, and the frustrations and challenges of working across different organisational cultures.



COVID-19 and Building Back Better

Mobilising collaborative action against COVID-19

COVID-19 has been the widest and fastest-spreading public health emergency for a century and has thrown our worlds into unknown territory. The highly interconnected nature and complexity of our societies means that the required response to a global crisis such as COVID-19 is way outside the purview and capacity of government on their own. An all-of-society approach is imperative, and coordination of efforts and innovative collaborations within and across societal sectors are essential – at every level – to maximize collective value and make the most of the resources we have.

In response to the crisis, TPI's global network of Associates and sister organisations came together for a rapid response programme made up of three elements:

- **Support:** TPI offered a free helpdesk providing direct support to anyone who needed assistance in setting up a COVID-19 partnership or to those in an existing partnership that was struggling and having to adapt within the current reality of COVID-19;
- **Research:** A 'rapid partnering' research programme to develop effective practice on partnering under pressure that can be used, for example, around climate change;
- **Advocacy and thought leadership:** Advocacy around the use of multi-stakeholder partnerships to tackle COVID-19 as well as an all-of-society approach to redesign a society that is more inclusive, resilient and sustainable '**#BuildBackBetter**'. Thought leadership through a series of blogs and think pieces (Framing think-piece by Darian Stibbe: Fighting side-by-side against COVID-19)



In addition TPI participated in live written discussions with Business Fights Poverty:

- [How Can Partnerships Create Rapid Innovation During COVID-19 Crisis?](#) TPI joined a Business Fights Poverty online discussion in April 2020, to explore what we can learn from new partnerships emerging during COVID-19 and the innovations they are creating, with a focus on business-led partnerships.
- [How can businesses support their NGO partners through the impact of COVID-19?](#)
- [How can business help in the building of national coalitions and collaborations to fight COVID-19?](#)

Building Forward Better – Closer sector collaboration to build a more resilient future

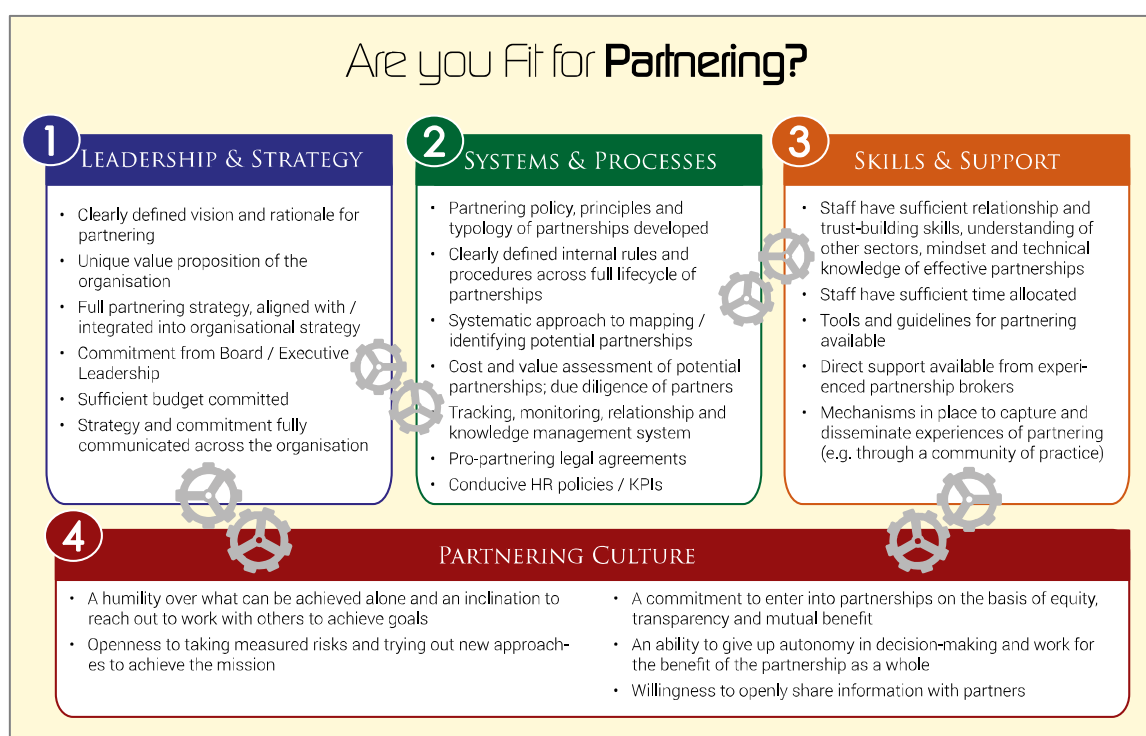
Working with the International Council on Mining and Metals (ICMM), Business Fights Poverty and Jane Nelson (director of the Harvard Corporate Responsibility Initiative), TPI developed a '[Building Forward Better](#)' framework for the mining industry, to guide both immediate responses to, and long-term recovery from the COVID-19 pandemic.

Three key areas for action are identified in the Framework: lives (health and safety), livelihoods (jobs and income) and learning (education and skills). Through these lenses, companies can identify practical actions to take across their core business activities, community investment programs and policy engagement, that support community rebuilding and resilience.

The Framework sets out dozens of practical examples of how leading companies in the mining industry are responding to COVID-19; and provides ideas for how mining companies and potential partners may collaborate in a long-term response to the ongoing pandemic.



Fit For Partnering



TPI's framework for assessing and analysing institutional capability to partner, the [Fit for Partnering Framework](#), captures the *institutional* competencies required to partner with excellence, focussing on four elements: Leadership and Strategy, Systems and Processes, People, and Culture.

TPI has continued to work with organisations in assessing and building their institutional capability to partner effectively, through the development of partnering strategies, tools and guidance material, advice on systems and processes and training.

World Vision International (WVI)

As part of World Vision's ambitious 'Partner of Choice' programme, TPI has worked extensively with WVI over several years to raise understanding and knowledge of partnering across the organisation, and specifically to build the institutional capacity of country offices to partner effectively and strategically. In January and February 2020 TPI worked with World Vision China to conduct an assessment of their partnering capabilities, through research based on staff and partner online surveys, as well as in-depth interviews with selected staff and partners. The results, analysis and recommendation were shared with WV China in the form of a Fit for Partnering report, which forms a part of the action plan used by the country team to improve systems, processes, and staff capabilities to support partnering excellence.

Direct and indirect support

Sanitation and Water for All (SWA)

Following last year's support to the Sanitation and Water for All (SWA) Partnership on the development of its new 10-year global strategy, TPI provided further support on its implementation, specifically: supporting the development of a results framework and the development of four 'regional roadmaps' in Latin America and the Caribbean; sub-Saharan Africa; Asia; and Middle East and North Africa.

City Cancer Challenge

City Cancer Challenge (C/Can) leads a city-based partnership initiative that aims to improve access to quality cancer care in cities around the world by transforming the way stakeholders from the public and private sectors collectively design, plan, and implement cancer solutions. C/Can was initiated by the Union for International Cancer Control (UICC) but in January 2019 became an independent organisation facing a period of scale up. C/Can engaged TPI to test the robustness of existing policies, codes and frameworks around Conflicts of Interest and Board governance, particularly in relation to the role of the private sector. Board Members, Partners, staff and external stakeholders were interviewed, and a review was carried out of comparable initiatives to understand how best to tackle COI in multi-stakeholder approaches. TPI submitted recommendations based on this work, as well as initiating a broader discussion around accountability, particularly in the cities where C/Can is operational.

Moving Minds Alliance (MMA)

In summer 2019, TPI was commissioned by the Moving Minds Alliance (MMA) to support their partnership working. Moving Minds is a funders collaborative and network that works to scale up coverage, quality, and financing of support for young children and families affected by crisis and displacement. TPI was approached to provide support and advice on the Alliance's governance structure, membership, partnership arrangements, working groups, and funding structure. Interviews were carried out with partners, members, and the secretariat in September 2019, and a Partnership Health Check survey undertaken. In October 2019 TPI presented a set of recommendations to the MMA Secretariat and Steering Group.

Partnering for Green Growth (P4G)

For the second year running, TPI supported P4G, an international initiative to fund transformational commercially viable partnerships contributing to mainly environmental SDGs. In collaboration with GlobalCAD, TPI conducted an independent evaluation of partnerships applying for P4G support through [P4G's Call for 2020 Partnerships](#). TPI supported the development of application materials, scored the top 100 applications, providing detailed evaluations for the top 30, and conducted a detailed investment evaluation of finalists for scale-up funding. In addition, TPI shared strategic and forward-looking recommendations and lessons learned to better shape selection processes in the future.

Novo Nordisk

Novo Nordisk has invested significant time in developing a partnership framework/maturity model between the pharmaceutical industry and IPAs (international professional associations). In the summer of 2020, TPI began work with Novo Nordisk to review and support the revision of the framework as well as supporting the engagement process. The second stage in the project comprises a consultation process aiming to provide insights into what 'great partnership looks like' between the pharma industry and IPAs. In the last stage of the project TPI will then use insights gathered from IPAs to validate Novo Nordisk's framework and suggest next steps for implementing the model.

Gain / Harvest+

Throughout 2019, TPI supported the implementation of a major new global partnership around biofortification of staple supply chains, between GAIN and HarvestPlus, two leading global players in the nutrition space. TPI's role involved brokering the relationship, building partnering knowledge and capacity, and developing structures and operating guidelines. This included facilitating global meetings, supporting individual partnership managers and conducting a mid-year partnership 'health check'. The project was completed with a tailored partnership and governance manual setting out all aspects of how the partnership will operate going forward.

SUN Business Network

Convened by the Global Alliance for Improved Nutrition (GAIN) and UN World Food Programme (WFP), the SUN Business Network (SBN) aims to reduce malnutrition through mobilising business to invest and innovate in responsible and sustainable actions and operations. In order to implement this work at national level, SBN has developed a series of in-country networks. TPI teamed up with not-for-profit consultancy, Mokoro, to undertake an independent evaluation of SBN, to assess the relevance, internal consistency and feasibility of its theory of change at both global and national levels. The evaluation was very well received and will underpin the development of SBN's new strategy.

Water.org

TPI began a programme to support Water.org to become institutionally Fit for Partnering. The programme was suspended due to COVID-19.

USAID Vietnam and Jamaica Private Sector Landscape Analyses

From April 2019 through June 2019, TPI worked with Resonance Global as part of the Promoting Excellence in Private Sector Engagement (PEPSE) project, to carry out a **Private Sector Landscape Assessment (PSLA) in Vietnam** to identify and prioritize concrete private sector collaboration opportunities—including partnerships related to Disaster Risk Management, Disaster Risk Reduction, preparedness, response, and early recovery—and to identify a pathway forward for Office of U.S. Foreign Disaster Assistance (OFDA) to build high-impact Private Sector Engagement initiatives that will mitigate the impact of disasters, and reduce suffering and loss of life once disasters occur. The assessment aimed to identify PSE priorities and opportunities for OFDA by understanding the experience, strengths, challenges, and interests of the private sector in disaster preparedness, relief, and response.

In the same way, in November 2019, **TPI supported PEPSE's PSLA in Jamaica**. USAID/Jamaica's priority is understanding PSE opportunities in Disaster Risk Reduction and Response, Caribbean Basin Security Initiative, and the U.S. President's Emergency Plan for AIDS Relief (PEPFAR). The PSLA was informed by stakeholder interviews with over 100 private sector companies, chambers of commerce, and business associations, as well as other stakeholders. The aim was to gain a stronger understanding of the interests, operations, challenges, and goals of the private sector related to the three program sectors and to identify resource mobilization and market-based PSE opportunities for USAID/Jamaica.

Strategic programmes and research

Partnering for Philanthropic Impact

Philanthropic organisations have a hugely important and unique role in supporting the delivery of the SDGs: as partners, as funders, as drivers of innovation and as catalysts for collective action. To maximise the value from partnerships, foundations are finding they need to change the way they think and operate. The Partnering for Philanthropic Impact programme brings together philanthropic foundations in the US, Europe and beyond to collectively explore current approaches in the sector and directly and practically support the partnering ambitions of the foundations involved.

Within the programme, foundations are understanding the incentives for change, exchanging good practice around partnering, developing new approaches, process and guidance, and discovering what it means for a foundation to be institutionally fit for partnering. The programme began with an initial inquiry phase to establish a baseline and needs analysis for the sector, and to work with Pioneer Foundation Members Z Zurich Foundation and Johnson & Johnson Foundation to carry out tailored 'Fit for Partnering' assessments that look at how well they are institutionally set up and operating to maximise impact through collaboration.



Partnership Platforms for the SDGs – learning from practice



National multi-stakeholder 'partnership platforms' are important mechanisms to convene stakeholders around key development or business sustainability issues, and to systematically catalyse partnerships for the SDGs. They are being developed around the world and appear to have great potential to accelerate progress towards the SDGs.

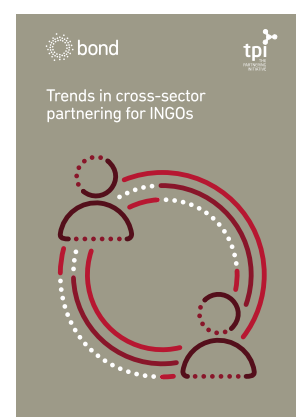
However, the term 'partnership platform' is used in a wide variety of ways to reflect a range of forms, structures and mechanisms. And despite the large overall number of such entities, there is a relatively small number of platforms that have been operating over a sufficient period of time, with sufficient evidence of impact, to be able to draw out lessons about what makes them effective.

In 2019, as part of the 2030 Agenda Partnership Accelerator, TPI and UN partnership platform experts began collaborating to respond to these challenges, by developing a research report based on a review of existing practice as well as theoretical approaches. The report will aim to provide: a basic partnership platform typology, to help provide a shared basis for knowledge and experience exchange; a brief review of experience of different types of platforms using existing public evaluations, toolkits and reviews; a set of characteristics of a transformative partnership platform, based on examples drawn from existing practice. The report will be published in the next financial year.

Collaboration in a changing world: Trends in cross-sector partnering for INGOs 2020

In response to the major shifts in the context within which development and humanitarian partnerships operate, TPI collaborated with Bond to better understand emerging trends in cross-sector and multi-stakeholder partnering, the ways that different types of organisations are responding, and the kinds of support needed to successfully adapt to or influence these changes. The resulting study, [Trends in cross sector partnering for INGOs](#), was based on survey questions and interviews with a range of humanitarian and development actors. We looked at the ways in which INGOs and NGOs are responding to these changes and possible future scenarios.

To celebrate the launch of the report, TPI and Bond held a webinar in July 2020 to look at how INGOs can make a bigger impact – looking at the findings of the reports and hearing from leaders and partnership experts from the sector.



Learning from Consortia

Funded by the UK's Department for International Development, Learning from Consortia (LfC) is a support and research programme which seeks to learn from the experiences of the 13 consortia supported by the UK Aid connect programme, and to share the results of this learning with the wider development sector. The LfC programme, in partnership with Bond, aims to understand how best to support consortia to work effectively, equitably, and sustainably.

Through a participative research approach supported by an Academic Advisory Board, TPI is engaging with the consortia to learn from their experiences, to provide needs-based support, and to grow the research and evidence base to support future effective consortia approaches. During the year, the programme was designed, set up and launched, and is set to continue to December 2021.

Outreach

Arab Regional Workshop on VNRs – Strengthening Partnerships

TPI presented a session on Strengthening Partnerships at the Arab Regional Workshop on VNRs in Cairo in February 2020. The session introduced effective partnering for the SDGs at national level, with a focus on the unique resources the different sectors bring to the table, understanding business as an actor and new partner in development, the typology of multi-stakeholder partnerships, and the building blocks of effective partnership.

Second annual global meeting for UN Resident Coordinators – Taking Partnerships to Scale

In November 2019, TPI was invited to moderate a session of the second annual global meeting for Resident Coordinators convened by the Secretary-General of the United Nations in New York. The event was a Davos-style discussion entitled "Taking Partnerships to scale". The meeting brought together all Resident Coordinators of the United Nations with senior leaders of United Nations agencies, funds and programmes and other partners.

Partnership 2.0 for the new UNRC System

In February 2020, TPI facilitated a two-day meeting, part training and part strategic consultation, of UN Resident Coordinators (RCOs) at the United Nations in Riyadh, Saudi Arabia. The aims of the meeting included sharing experiences across countries and offices, better understanding the role of RCOs in developing partnerships for Agenda 2030, and creating a blueprint for an RCO Partnership Strategy.

How-to video with Business Fights Poverty: TPI collaborated with Business Fights Poverty to create [a video for business on How to partner with NGOs, government and others to deliver both business and development goals](#)

Podcast with Business Fights Poverty: Darian Stibbe was interviewed by Business Fights Poverty's Katie Hyson to discuss partnerships and COVID-19

Open and tailored trainings

The Partnering Initiative continued to develop its flagship [Building Effective Partnerships for Development](#) training, aimed at individual partnership practitioners, which was delivered this year mainly in the form of tailored trainings for a number of organisations, both in person and online.

UNSSC training series

The UN System's drive to shift from collaboration to co-creation is stated in the UN System Leadership Framework as the "need to catalyse action by building context- and issue-specific networks, coalitions and partnerships, leveraging the diverse contributions of all relevant stakeholders within and outside the UN" (Chief Executive's Board for Coordination). This year TPI continued to work with the United Nations System Staff College (UNSSC) in support of this ambition, helping to build capacity within the UN system for effective cross-sector partnering, through a series of webinars/online trainings introducing the key concepts, processes, tools and skills that form the basis of effective cross-sector partnering in the changing landscape of international development.

These were delivered for a range of UN agencies across the system, including the United Nations Population Fund, the Food and Agriculture Organisation, UN Women, UN Office for the Coordination of Humanitarian Affairs, and as part of the UN Secretariat Executive Management Programme. In addition, TPI delivered a webinar on Reinventing Partnerships: Leading for the Future and a webinar introducing Tools for Partnering with the Private Sector.

PEPSE training

TPI worked with Resonance Global, prime implementer of the USAID-funded Promoting Excellence in Private Sector Engagement (PEPSE) program, to prepare and facilitate a private sector engagement training and workshop for USAID in Dakar, Senegal.

Commonwealth Association

TPI delivered a training for the Commonwealth Association in London, building understanding of effective collaboration for 30 international organisations working with the Commonwealth.

Future plans

COVID-19 has had a fundamental, epoch-making impact on all of society and will continue to do so for years to come. On an optimistic note, it has, however, demonstrated how all sectors of society have been able to rise to a shared challenge. It has also reiterated the essential need for collaboration to deliver resilience and sustainable development, and TPI will continue to deliver services and training, build new programmes that drive the cutting-edge of partnership working, and work with partners on major programmes to build the enabling environment and infrastructure for partnering world-wide.

2030 Agenda Partnership Accelerator

Depending on the course of COVID-19, in 2020-21, TPI and UNDESA will continue to scale up the Partnership Accelerator, taking its blend of support and training to new countries around the world.

Green Transition

TPI's new Green Transition programme will drive the development of new approaches to support and accelerate partnerships for the transition to a just, green economy, focusing initially in 2021 on developing a Rapid Partnering Protocol for the Climate Crisis in the run up to COP26.

There is an opportunity to accelerate a collaborative response to rebuild societies post-COVID-19, to be better prepared to face future shocks and, in particular, to tackle the global climate emergency with speed and agility. The current global pandemic has demonstrated that such partnerships are possible. The urgency of the threat has galvanised rapid innovation and problem-solving, while apparently reducing the barriers to collaboration. This same urgency must be applied to Paris-aligned partnerships for climate mitigation, adaptation and resilience.

In the medium term, we will further scope opportunities to connect the health and environmental agendas for constructive collaboration, which may include mapping and supporting efforts across areas such as the destruction of nature and zoonotic disease; air quality and premature deaths; diabetes prevention and active travel/sustainable transport to break down silos and achieve strongly interrelated health and environment SDGs more efficiently. We will also explore how TPI might best support high potential city-level partnerships working on local green transition strategies to be as effective as possible.

Mining: Partnering for our common future

Building on its existing collaboration, TPI and ICMC will teamed up again in 2020/21 to produce a partnering resource that seeks to strengthen organisational capacity to become transformational partners in development. Over time, we hope to engage with the industry at multiple levels and help unleash its considerable potential.

Learning from Consortia

Plans for the second phase of the FCDO-funded *Learning from Consortia (LfC)* programme include providing continuing support to the 13 UK Aid Connect consortia, and continuing to draw out learning of effective consortia working.

Partnering for Philanthropic Impact

Following the successful Phase 1 Inquiry Phase of the *Partnering for Philanthropic Impact Programme*, TPI will work with a wider group of Foundations in 2020/21 to further strengthen partnering practice across the sector. The second phase, which will be co-developed with a small group of peer Foundations with similar interests, will develop the state-of-the-art of collaboration in specific, transformational focus areas such as systems leadership. We will draw out and codify effective practice, partly through peer-to-peer exchange of foundations going through similar issues, partly through directly supporting foundations to become 'fit for partnering' and learning from their experiences.

Administration

Public Benefit

The Trustees have complied with their duty to have due regard to the guidance on public benefit published by the Charity Commission in exercising their powers and duties.

Financial review

The results of the charity for the year can be seen on page 20.

Reserves policy

The Partnering Initiative aims to maintain in reserve four months' worth of operating costs, along with a development budget for creating new cutting-edge programmes. As at 30th September 2020, free reserves held were £223,683, which the Trustees deem acceptable.

Statement of trustees' responsibilities

The Trustees (who are also directors of The Partnering Initiative for the purposes of company law) are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the Trustees to prepare financial statements for each financial year, which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for the year. In preparing these financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP (FRS 102);
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The Trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- there is no relevant audit information of which the charitable company's auditor is unaware; and
- the Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditor is aware of that information.

The Trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

This report has been prepared having taken advantage of the small companies' exemption in the Companies Act 2006.

This report was approved by the Board on 14th May 2021



Robert Smith,
Chair of Trustees

Independent auditors' report to the members of The Partnering Initiative

Opinion

We have audited the financial statements of The Partnering Initiative (the 'charitable company') for the year ended 30th September 2020 which comprise the Statement of Financial Activities, the Balance Sheet, the Cash Flow Statement, and notes to the financial statements, including a summary of significant accounting policies.

The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 30th September 2019, and of its incoming resources and application of resources, including its income and expenditure (including income from the United Nations and related expenditure), for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The trustees are responsible for the other information. The other information comprises the information included in the trustees' annual report, other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial

statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Opinions on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

- the information given in the trustees' report (incorporating the directors' report) for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the directors' report has been prepared in accordance with applicable legal requirements.

Matters on which we are required to report by exception

In the light of our knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept, or returns adequate for our audit have not been received from branches not visited by us; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of directors' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit; or
- the trustees were not entitled to prepare the financial statements in accordance with the small companies' regime and take advantage of the small companies' exemptions in preparing the directors' report and from the requirement to prepare a strategic report.

Responsibilities of trustees

As explained more fully in the trustees' responsibilities statement set out on page 16, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists.

Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The specific procedures for this engagement and the extent to which these are capable of detecting irregularities, including fraud are detailed below:

- Enquiry of management and those charged with governance around actual and potential litigation and claims;
- Enquiry of management and those charged with governance to identify any instances of non-compliance with laws and regulations;
- Reviewing minutes of meetings of those charged with governance;
- Reviewing financial statement disclosures and testing to supporting documentation to assess compliance with applicable laws and regulations;
- Performing audit work over the risk of management override of controls, including testing of journal entries and other adjustments for appropriateness, evaluating the business rationale of significant transactions outside the normal course of business and reviewing accounting estimates for bias.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of our report

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

Graham Cole BA FCA (Senior Statutory Auditor)

For and on behalf of Wenn Townsend Chartered Accountants, Statutory Auditor

30 St Giles
Oxford
OX1 3LE

15th May 2021

Statement of Financial Activities (including Income and Expenditure Account) for the period ended 30th September 2020

		Unrestricted funds 2020 £	Restricted funds 2020 £	Total funds 2020 £	Total funds 2019 £
Income from:	Notes				
Charitable activities	2	624,534	111,849	736,383	562,294
Total income		624,534	111,849	736,383	562,294
Expenditure on:					
Charitable activities	3	577,420	111,849	689,269	566,754
Total expenditure		577,420	111,849	689,269	566,754
Net movement in funds		47,114	-	47,114	(4,460)
Balances brought forward at 1st October 2019		176,569	-	176,569	181,029
Balances carried forward at 30th September 2020		223,683	-	223,683	176,569

All income and expenditure derive from continuing activities.

The statement of financial activities includes all gains and losses recognised during the year.

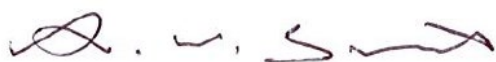
All funds in 2019 were unrestricted

Balance Sheet as at 30th September 2020

	Notes	2020 £	2019 £
Current assets			
Debtors	6	215,567	132,392
Cash at bank and in hand		69,902	103,641
		<u>285,469</u>	<u>236,033</u>
Creditors: amounts falling due within one year	7	(61,786)	(59,464)
		<u>223,683</u>	<u>176,569</u>
Net current assets		223,683	176,569
Net assets		<u>223,683</u>	<u>176,569</u>
Funds:			
Unrestricted funds			
General funds		<u>223,683</u>	<u>176,569</u>

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

The financial statements were approved and authorised for issue by the trustees on 14th May 2021 and signed on their behalf by:



Robert Smith
Chair of Trustees

Statement of Cash Flows for the year ended 30th September 2020

	2020 £	2019 £
Reconciliation of net (expenditure)/income to net cash flow from operating activities		
Net (expenditure)/income for year	47,114	(4,460)
Decrease in debtors	(83,175)	17,523
Decrease in creditors	2,322	19,177
Net cash flow from operating activities	<u>(33,739)</u>	<u>32,240</u>
Net (decrease)/increase in cash and cash equivalents	<u>(33,739)</u>	<u>32,240</u>
Cash and cash equivalents at 1st October 2019	<u>103,641</u>	<u>71,401</u>
Cash and cash equivalents at 30th September 2020	<u><u>69,902</u></u>	<u><u>103,641</u></u>

Notes forming part of the financial statements for the period ended 30th September 2020

1 Summary of significant accounting policies

a) General information and basis of preparation

The Partnering Initiative is a charitable company limited by guarantee in the United Kingdom. In the event of the charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the charity. The address of the registered office is given in the charity information in these financial statements. The nature of the charity's operations and principal activities are detailed in the Trustees' Report.

The charity constitutes a public benefit entity as defined by FRS 102. The financial statements have been prepared in accordance with Accounting Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014 (as updated through Update Bulletin 1 published on 2nd February 2016), the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102), the Charities Act 2011, the Companies Act 2006 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on a going concern basis under the historical cost convention modified to include certain items at fair value. The financial statements are prepared in sterling which is the functional currency of the charity.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

b) Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

c) Income recognition

All income is included in the Statement of Financial Activities (SoFA) when the charity is legally entitled to the income after any performance conditions have been met, the amount can be measured reliably and it is probable that the income will be received.

The charity receives government grants in respect of the Coronavirus Job Retention Scheme. Income from government and other grants are recognised at fair value when the charity has entitlement after any performance conditions have been met, it is probable that the income will be received and the amount can be measured reliably. If entitlement is not met then these amounts are deferred.

Project grants and service contract fees are included as income where any work involved has been undertaken by the period end date. Any income received in advance is deferred until associated costs are incurred and based on the level of completion of the project.

Gifts in kind donated for distribution are included at valuation and recognised as income when they are distributed to the projects. Gifts donated for resale are included as income when they are sold. Donated facilities are included at the value to the charity where this can be quantified and a third party is bearing the cost. No amounts are included in the financial statements for services donated by volunteers..

d) Expenditure recognition

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure is recognized where there is a legal or constructive obligation to make payments to third parties, it is probable that the settlement will be required and the amount of the obligation can be measured reliably.

Irrecoverable VAT is charged as an expense against the activity for which expenditure arose.

Fund-raising costs are those incurred in seeking voluntary contributions and do not include the costs of disseminating information in support of the charitable activities. Support costs are those costs incurred directly in support of expenditure on the objects of the charity and include project management. Governance costs are those incurred in connection with administration of the charity and compliance with constitutional and statutory requirements.

e) Foreign currencies

Foreign currency transactions are initially recognised by applying to the foreign currency amount the spot exchange rate between the functional currency and the foreign currency at the date of the transaction.

Monetary assets and liabilities denominated in a foreign currency at the balance sheet date are translated using the closing rate.

f) Employee benefits

When employees have rendered service to the charity, short-term employee benefits to which the employees are entitled are recognised at the undiscounted amount expected to be paid in exchange for that service.

The charity operates a defined contribution plan for the benefit of its employees. Contributions are expensed as they become payable.

g) Debtors and creditors receivable/payable within one year

Debtors and creditors with no stated interest rate and receivable or payable within one year are recorded at transaction price. Any losses arising from impairment are recognised in expenditure.

h) Tax

The charity is an exempt charity within the meaning of schedule 3 of the Charities Act 2011 and is considered to pass the tests set out in Paragraph 1 Schedule 6 Finance Act 2010 and therefore it meets the definition of a charitable company for UK corporation tax purposes.

i) Going concern

The financial statements have been prepared on a going concern basis as the trustees believe that no material uncertainties exist. The trustees have considered the level of funds held and the expected level of income and expenditure for 12 months from authorizing these financial statements. The budgeted income and expenditure is sufficient with the level of reserves for the charity to be able to continue as a going concern.

2 Income from charitable activities

	2020	2019
	£	£
Service contract fees	423,102	466,287
DFID (Learning from Consortia)	111,849	-
Programmes	136,647	65,051
Training courses	54,083	30,956
CJRS Grant	10,702	-
	<u>736,383</u>	<u>562,294</u>

3 Charitable activities

	Direct charitable costs	Indirect charitable costs		Total 2020	Total 2019
	£	Administration £	Governance £	£	£
Consultancy	290,812	21,782	-	312,594	232,794
Wages and salaries	214,679	65,719	12,974	293,372	281,155
Travel & accommodation	17,281	2,598	-	19,879	24,634
Rent and rates	-	15,886	-	15,886	15,819
Website & IT costs	-	3,129	-	3,129	2,061
Printing, postage & stationary	175	849	-	1,024	1,033
Telephone	40	2,884	-	2,924	2,938
Bank charges	-	1,846	-	1,846	1,361
Professional charges	-	-	-	-	319
Irrecoverable VAT	3,247	1,419	-	4,666	-
Insurance	-	605	257	862	822
General expenses	2,515	7,870	73	10,458	6,695
Audit fees	-	-	2,935	2,935	2,095
Foreign exchange losses/gains	-	19,694	-	19,694	(4,972)
	528,749	144,281	16,239	689,269	566,754

4 Trustees' and key management personnel remuneration and expenses

There was no Trustees' remuneration or expenses reimbursed to Trustees during the year (2019: nil) for their role as Trustees.

The total amount of employee benefits received by key management personnel is £107,512 (2019: £105,340). The Trust considers its key management personnel comprise the Board of Trustees and the Chief Executive.

5 Staff costs

	2020 £	2019 £
Wages and salaries	248,038	242,085
Social security costs	24,061	20,346
Pension costs	21,273	18,724
	<u>293,372</u>	<u>281,155</u>

The number of employees whose emoluments as defined for taxation purposes amounted to over £60,000 in the year was as follows:

	2020 Number	2019 Number
£80,000 - £90,000	<u>1</u>	<u>1</u>

The average number of employees, calculated on a full-time equivalent basis, analysed by function was:

	2020 Number	2019 Number
Charitable activities	5	4
Management and administration of the charity	1	1
	<u>6</u>	<u>5</u>

6 Debtors

	2020 £	2019 £
Grants and fees receivable	169,743	122,646
Prepayments and accrued income	45,805	9,725
Other debtors	19	21
	<u>215,567</u>	<u>132,392</u>

7 Creditors: amounts falling due within one year

	2020 £	20189 £
Trade creditors	33,212	31,749
Accruals and deferred income	21,755	9,300
Other tax and social security	6,819	18,415
	<u>61,786</u>	<u>59,464</u>

8 Restricted funds

Restricted funds relate to funds from DFID for the Learning from Consortia Programme.

9 Related Parties

There were no related party transactions in the current or preceding year.