

# BEYOND SCALE

How to make your digital development program sustainable



# BEYOND SCALE

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## Authors' Note

*Beyond Scale* details key questions and challenges that non-governmental organizations (NGOs) and social enterprises face when scaling and sustaining digital development programs.

It is particularly relevant for programs at the four-to-five-year mark, which some describe as the 'valley of death'.

It shares learning from practitioners who have made this journey, navigating pitfalls while pursuing alternative pathways to scale and sustainability. These include replicating programs in new geographies to achieve greater economies of scale, and diversifying products and services to deepen impact and create new income streams.

*Beyond Scale* also shares practical guidance from practitioners who have transitioned program ownership to government, or are covering costs through user fees or private-sector investment.

While there are guides and toolkits available to plan the initial implementation of a digital development program, there are fewer guides for organizations at this later stage of maturity that examine both public- and private-sector routes to scale and sustainability across sectors (e.g., health, agriculture). We recognize that every digital development program is unique. Each goes through different phases, and the phases are triggered by different circumstances. However, we found that no matter what sector or geography we examined, there are some questions and approaches that are remarkably common.

### *Beyond Scale:*

- Provides key steps for addressing relevant questions and challenges
- Offers tested templates and tools the reader can apply
- Provides real-life examples of how others have tackled similar problems
- Suggests a set of curated resources where the reader can learn more about topics integral to scale and sustainability

Our hypotheses and findings, based on our review of more than 400 books, articles and interviews, are intended to spark a dialogue about how mature digital development programs can prepare for scale and sustainability.

There are no one-size-fits-all answers to the challenges faced in the next phase of digital development, and this guide is not intended as a peer-reviewed or academically rigorous inquiry into all issues organizations deal with at this stage. Rather, we have focused on suggesting frameworks and providing examples and templates for practitioners to stimulate thought and discussion. We included experiences from multiple sectors, geographies and perspectives from nonprofit, for-profit and government-based programs.

We hope that by documenting these perspective and experiences, it might help your program or organization make a smooth transition into your next phase. Most importantly, we want to hear from you. Please contribute your feedback and examples to [\*\*beyondscale@digitalimpactalliance.org\*\*](mailto:beyondscale@digitalimpactalliance.org)



## Introduction

Some time ago, leaders of two very different digital programs sat 5,500 kilometers apart, thinking about the future. One led a nonprofit digital health program for new and expecting mothers in India; the other led a for-profit digital agricultural program for farmers in several African countries. While they worked in different sectors and deployed different technological solutions, they had similar questions about their program's growth trajectory, including how to ensure not just scale but sustainable impact for years to come.

*In Delhi, BBC Media Action had just begun planning the transition of three mobile health education services to the Government of India. The organization had already scaled two of its services to three states in collaboration with local government, but the program was still dependent on donor funding for survival. The program was in year four of its five-year grant cycle, and BBC Media Action had less than two years to develop strategies for transitioning each service to government, secure government buy-in at the state and national levels, plan and cost the transition process and raise funds to pay for it.*

*Many questions arose: What strategic approaches to transitioning the services to government would be most effective? How much would it cost to scale and run the services? What costs could the government cover in compliance with its procurement policies, and what costs would need to be covered by donors? How would the solution design need to change to balance the need for localization with the requirements of scale? How could contracts with mobile operators be transitioned to government, and what service level agreements would the government require? Would BBC Media Action's existing technical partnerships be able to accommodate these changes, or would new partnerships be needed? These were just a few of the questions being asked, with many more yet to be discovered.*

*At the same time in Nairobi, Esoko, a social enterprise providing mAgri services to farmers, was contemplating its future and how to prioritize its scant resources. After a successful start delivering donor-subsidized services in Ghana, the company's growth had slowed as it reached market saturation.*

*Looking for new strategies to ensure financial sustainability, Esoko recognized potentially high demand for its services in other countries. Expansion to new countries would increase the number of communities Esoko served, but it would also require experimenting with new business models and diversifying its service offering. The Esoko team faced a challenge familiar to software entrepreneurs the world over. How would changes to its services affect payment processes and vice versa? What new legal and regulatory issues would the company face as it entered new markets in Kenya and Uganda? How would they affect current employees? What activities should they outsource, and which skills would they need in-house?*

# BEYOND SCALE | Introduction

Over the past decade, the number of public- and private-sector programs providing digital solutions to underserved communities in areas like agriculture, education, financial services, health and resilience has increased exponentially. In 2009, the GSMA estimated there were just 400 such programs worldwide. By 2015, this number had swelled to over 1,500.<sup>1</sup> Rapid growth has been driven by an explosion in mobile phone use: the majority of the world's population now has access to a mobile device.

In the last decade, practitioners have learned a lot of hard lessons about designing, developing and implementing effective information and communications technology for development programs, also known as digital development. Many excellent guides have been published about best practices and guiding principles for developing new solutions, based on insights gained from innovative pilot projects.

Guidance has been developed around monitoring, measuring and evaluating the impact of digital development investments. There is now a growing evidence base identifying what does and doesn't work. What is scarcer, however, are resources documenting the experiences of implementers who have taken their digital development programs beyond the four-to-five-year mark to achieve significant scale and varying degrees of financial sustainability.

This guide presents the experience of two such organizations, BBC Media Action and Esoko, as well as those of other implementers, including Akros, Bangladesh Directorate General of Health Services, BeeHyv, Cell-Life, Digital Green, Dimagi, D-tree, Echo Mobile, HealthEnabled, IMImobile, Jembi Health Systems, Johns Hopkins Global mHealth Initiative, Kapil Sapra & Associates, Kopo Kopo, mHealth Kenya, MR. SOLAR, PATH, Praekelt Foundation, Signum Advocates, SolarNow, TaroWorks, United Nations Capital Development Fund (UNCDF), Vital Wave and Xavier Project.

It explores the processes of scaling through **replication**, where the experience of a digital solution is **replicated** for more users in more geographies, and scaling through **diversification**, where an organization **diversifies** its products and services to offer new solutions to achieve scale. And finally, *Beyond Scale* examines both **public- and private-sector routes to financial sustainability**, illuminating the complex and transformative journeys that NGOs are making to secure the futures of their digital programs.

*Beyond Scale's* target audience is implementers in digital development organizations. The guide is specifically tailored for in-country NGO staff who have already successfully piloted digital development solutions and are now exploring not just how to scale them, but how to make them sustainable. This guide will also be especially useful for NGOs, digital development companies and social enterprises facing similar challenges.

<sup>1</sup>The Mobile Economy 2015, [https://www.gsma.com/mobileeconomy/archive/GSMA\\_ME\\_2015.pdf](https://www.gsma.com/mobileeconomy/archive/GSMA_ME_2015.pdf)

The guide addresses key questions, including:

- ▶ How might your **program strategy** need to change to enable financial sustainability, and how might this affect your organization?
- ▶ How might your funding or **business model** need to change to ensure financial sustainability?
- ▶ What new **legal, policy or regulatory** issues might need to be considered and how might your legal agreements need to change?
- ▶ Do you have the right **partner relationships** in place to enable scale and sustainability, or are new partnerships required?
- ▶ Do you have the right **human capacity** to make these strategic changes, or do you need to retrain or hire staff with different skills and experiences?
- ▶ How might your approach to **roll out**, including everything from technical support and customer care to marketing and distribution, need to change?
- ▶ How might your **solution design** need to change to enable replication or diversification of your program offering?

*Beyond Scale* lays out a series of key steps that readers can work through to answer these questions and provides lessons learned by implementing organizations. We believe there are no right or wrong answers about how to evolve your digital development program. But we also recognize that the digital development field is a young and dynamic one and that we all have something to learn and something to teach. We hope you find this guide helpful on your journey *Beyond Scale*, and we hope that you will share your work and thoughts with us. Please contribute your feedback and examples to [beyondscale@digitalimpactalliance.org](mailto:beyondscale@digitalimpactalliance.org)

## How to read *Beyond Scale*

This guide is divided into **seven** modules. It is structured so that it can be read whole or in parts. Each module is organized around one topic, such as legal, policy and regulatory concerns, business models or partnerships, and how these relate to the diverse challenges of scale and sustainability. Each module offers a series of key steps brought to life by real-world examples from BBC Media Action, Esoko and other digital development organizations. Useful tools, templates, guides and articles are linked to throughout the guide as actionable how-to tips, which readers can apply to their own work.

It's unlikely that all readers will find all modules useful. Different staff, depending on their role in an organization, are likely to find specific modules more applicable to their work than others. In the table below, we have mapped each module against the roles and job titles typically found in a NGO-based digital development program. For example, if you are the Program or Project Director of a digital intervention, you may find the modules on Strategy, Business Model, Legal, Policy and Regulatory, Partner Relationships and Roll Out most useful.

# BEYOND SCALE | Introduction

## MODULE

ROLE	Strategy	Business model	Legal, policy, and regulatory	Solution design
Program or Project Director	•	•	•	
Head of Operations or HR Manager	•	•	•	
Head of Finance or Marketing Manager	•	•	•	
Project Manager				•
Head of Engineering or IT Manager				•

## MODULE

ROLE	Roll out	Human capacity	Partner relationships
Program or Project Director	•	•	•
Head of Operations or HR Manager	•	•	•
Head of Finance or Marketing Manager	•		•
Project Manager	•	•	•
Head of Engineering or IT Manager			

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# PARTNER RELATIONSHIPS

**BEYOND SCALE:**

How to make your digital development program sustainable

Module 7 of 7





# PARTNER RELATIONSHIPS

## MODULE SUMMARY

Whether you're an NGO or a social enterprise, you may have reached a point in your digital development program where some of your partnerships are working and others need to be reevaluated. As digital development solutions scale, transition ownership or develop new business models, their dependence on partnerships tends to increase, as does the complexity of these relationships.

Organizations often need to identify new technical solution partners, engage in deeper partnerships with government, and strike new commercial relationships. For example, you may be trying to transition your digital tool or service to government while simultaneously renegotiating with mobile network operators (MNOs) for cheaper network access time, with commercial vendors for cloud hosting and with both for higher levels of technical support.

Identifying which existing partner relationships need to be extended and renegotiated, and where you have partnership gaps, is important to do early, as these negotiations can take years.

Partnerships are effective when the value proposition to each partner is clearly defined in the beginning and reflected in written agreements. Creating partner structures and communication channels will allow you to continually reassess what is working — or not working — in the relationship and make it easier to realign partners' contributions as needed.

This module explores ways in which the mix of partners and the intensity of their engagement changes on the journey to scale and sustainability. It is based on interviews and conversations with digital development leaders at organizations including BBC Media Action, Esoko, Jembi Health Systems, International Center for Research on Women (IRCW), HealthEnabled and Digital Green.

The steps below aim to help you review your external partnerships, and identify new partners, who you might need to achieve scale and sustainability.

### **This module provides guidance from digital development implementers on how to:**

- ▶ **1** Assess your digital program's existing partnerships
- ▶ **2** Identify potential new partners
- ▶ **3** Update agreements and revise your **governance structure**
- ▶ **4** Transfer knowledge to your partners

## Key steps

# 1

### ASSESS YOUR DIGITAL PROGRAM'S EXISTING PARTNERSHIPS

- Map your partners' roles and responsibilities against yours
- Assess your existing partners' combined abilities to meet new demands

# 2

### IDENTIFY POTENTIAL NEW PARTNERS

- Assess the skills and capacities of potential new partners
- Identify the incentives for them to participate
- Assess whether more resources are needed to manage a growing consortium of partners

# 3

### UPDATE AGREEMENTS AND REVISE GOVERNANCE STRUCTURES

- Review and renegotiate your existing contracts
- Clarify and document mutual goals with new partners
- Revise your **governance structure**

# 4

### TRANSFER KNOWLEDGE TO YOUR PARTNERS

- Develop plans for transferring knowledge and building capacity
- Update the way you measure partner performance
- Refine mechanisms for partner feedback and communication

# STEP 1

## ASSESS YOUR DIGITAL PROGRAM'S EXISTING PARTNERSHIPS

### Map your partners' roles and responsibilities against yours

Some organizations find that creating a map of existing partners and stakeholders is a useful exercise. It can help you clarify current roles and responsibilities and identify overlaps and gaps based on your future strategy, **business model** and roll out plans. It may also help you systematically challenge your assumptions about who should do what or identify areas where new partnerships might strengthen your efforts and enable greater scale and sustainability.

Implementers interviewed for this guide note that a partnership map is also a useful tool for beginning a dialogue with your existing partners about the next phase. Proactive conversations with partners before you begin your expansion or transition can help ensure shared understanding of expectations and value propositions. They can also help identify less tangible issues that often derail partnerships, like differences in work cultures and unspoken goals.

### Assess your existing partners' combined abilities to meet new demands

After you've completed a partnership map, you can do a **gap analysis** to identify whether you have the right partners with the necessary skills and capabilities to take your digital solution to the next stage. This exercise will answer questions such as: Can your digital solution handle two to three times the current call volumes or transactions? If not, are your technical partners capable of scaling your digital solution to meet stakeholder needs? Do they have the local resources to support the digital solution at scale, meeting stringent **service level agreements** (SLAs)? Do they have a physical presence in your expansion geographies? Do they have the local knowledge required for effective marketing and sales?

Proactive conversations with partners are essential, but a thorough assessment also draws on desk research and expert third-party analysis where possible. In some circumstances, it may be worth going through a competitive procurement process to determine whether your existing partners still offer the best value for your money, particularly if you may be asked to justify your choice of partners to government or private-sector stakeholders in the future.

## In practice | Digital Green

Watch Rikin Gandhi from **Digital Green** talk about how they used digital tools to create a sense of ownership among partners.



## Other examples

- ▶ **Jembi Health Systems**, a health technology NGO, found while planning the scale-up of a project for the South Africa National Department of Health that it needed to partner with a national help desk to offer referrals to patients — something that was outside Jembi's expertise and capacity. After reaching a partnership agreement with a national help desk, the program began promoting the help desk number in its messaging.

## How to

- ▶ Learn more about mapping partner ecosystems [here](#)
- ▶ Learn how to conduct an internal partner assessment [here](#)
- ▶ Find additional insights about how to talk about your value proposition to partners [here](#)
- ▶ See an internal prospective partnership assessment checklist [here](#)

FOR MORE INFORMATION SEE:

- ▶ **Solution Design: Step 4. PLAN YOUR TECHNICAL DEVELOPMENT FOR SUSTAINABILITY AT SCALE**

## STEP 2

### IDENTIFY POTENTIAL NEW PARTNERS

#### Assess the skill and capacity of potential new partners

After carrying out a **gap analysis** to identify the skills and capacities that you don't have but need for the next phase, it's time to identify and evaluate possible new partners. To evaluate new solution and service providers, you could send out a **request for information** (RFI) to a long list of potential vendors. An RFI is a great way of assessing what's available in the marketplace and will help you develop a more comprehensive **request for proposal** (RFP) or **request for quotation** (RFQ).

As part of this process, you can ask potential vendors for customer references so you can get third-party perspectives on their service quality and reliability. Ask them to provide summary CVs or biographies of the staff they will dedicate to your project and request interviews with key people to ensure a good cultural fit and rapport with your teams.

On the other hand, if you need to find partners to adopt your digital solution — such as government or a **fast-moving consumer goods** company — or to share costs and revenue to make your solution sustainable, you may want to do a **landscape analysis** to identify potential partners in a specific sector and geography.

The annual reports and **public filings** of large, publicly owned companies such as MNOs can provide useful data on how much revenue they make from different channels, products and services and give you insights into their priorities. For example, have they already invested in **value-added services** for low-income populations? Or are they more focused on data services for urban customers? You may also be able to identify network costs and profit margins from their annual reports which will be useful if you're trying to negotiate discounted price points for services or an increased revenue share.

For any prospective partner, getting a sense of their current relationships is important. Do they support other digital development programs? If yes, who are their key partners? Meet with these partners to understand the scale and complexity of their programs and the level of investment that they've secured.

**In practice | Esoko****Strong MNO partnerships can make a big contribution to scale**

*We have partnerships with a number of different organizations that have helped us expand the services we offer and make them more interesting to our farmers. We partnered with Vodafone in Ghana to create the Vodafone Farmers' Club to allow users to pay for farming tips and market information with mobile phone credit. This made it easy and more comfortable for farmers to use our service, since they were already using mobile credit to purchase other **value-added services**. As a result, farmers were more willing to pay for our service, which made our revenue forecasting easier.*

*Partnerships with MNOs have also helped us scale our services efficiently. We operate an in-house call center, but our MNO partners manage our voice lines. Since this is part of their core business, they already have the technical skills needed to manage voice lines at scale and can handle issues much faster than we can. Similarly, in periods of high demand for our services — when there is a crop disease outbreak and many farmers are calling for advice — our MNO partners have the infrastructure to scale up the number of voice lines we need immediately. We leverage the existing scale of their operations and the methods they use to deliver their own services in order to deliver ours.*

FOR MORE INFORMATION SEE:

► **Business Model: STEP 4. FORECAST THE REVENUE FOR YOUR DIGITAL PROGRAM**

**Other examples**

► The South Africa National Department of Health provides program coordination for the activities of over 20 NGO and donor partners delivering targeted mobile messages for pregnant mothers via **MomConnect**. Partners provide services ranging from software and content development to customer support and outreach. The program has scaled to serve over a million pregnant women across the country. Read more about the partnerships [here](#).

► **Digital Green** looks for three main attributes in field partners who use videos to support their agricultural programs: domain expertise in agriculture, current scale and expansion plans and whether they have strong community links supported by dedicated staff. Over time, it found that many partners were not always aware of the latest technologies and knowledge emerging from research. Digital Green plugs these gaps by pairing its partners with domestic and international research organizations that want access to field-based data from NGOs and government agencies. Both types of organizations benefit from these two-way exchanges of technical know-how and farmer feedback and they also strengthen the Digital Green network.

## Identify the incentives for them to participate

The next phase of your digital intervention may rely heavily on strategic partnerships with the private sector, government or both. Identifying what partners might want from the relationship — and whether your needs are aligned — is critical.

For example, does your strategy rely on government procurement, **distribution**, and support for software, hardware, devices and connectivity? If yes, this is a big ask, and it's vital to identify and quantify the benefits. You may need to establish that your digital solution is more cost-effective than the alternatives and prove that it can reach scale and still be manageable and cost-effective. Alternatively, your strategy may rely on renegotiating partnerships with MNOs to reduce costs or get discounted pricing for voice calls or data. This will only succeed if you understand their business goals and appeal to them by offering a tangible benefit.

FOR MORE INFORMATION SEE:

- ▶ **Business Model: STEP 3. IDENTIFY WHO IS GOING TO PAY FOR THE NEXT PHASE**
- ▶ **Solution Design: STEP 4. PLAN YOUR TECHNICAL DEVELOPMENT FOR SUSTAINABILITY AT SCALE**

You may need to establish that your digital solution is more cost effective than the alternatives and prove that it can reach scale and still be manageable and cost effective.

## Assess whether more resources are needed to manage a growing consortium of partners

While small programs regularly use core staff time to manage partners, rapidly expanding programs may require a dedicated individual or even a separate organization to coordinate the efforts of a growing consortium of partners. This can entail creating a **project management office** (PMO) to manage day-to-day interactions and coordinate partner activities during program implementation. For programs where ownership is being transitioned, this PMO may involve participation by the original owner, at least initially. A PMO can also play an important role in knowledge transfer between partners. The costs of managing more partners should be weighed against the benefit they bring in filling specific gaps in capacity and expertise. This will help you make strategic decisions about whether to bring on new partners or develop the capacity in-house.



## How to

- ▶ Read more about partnerships in digital development and the role of PMOs [here](#)
- ▶ View a go/no-go decision checklist used to assess the costs, risks and value of partnerships [here](#)

# STEP 3

## UPDATE AGREEMENTS AND REVISE GOVERNANCE STRUCTURES

### Review and renegotiate your contracts

Some digital development programs outgrow the agreements or contracts that were created when the programs first started. **Service level agreements** (SLAs) are a good example. You may not have signed SLAs with your technical partners at the pilot stage, or you might have agreed to slow response times to accommodate time zone differences or limited staff resources. Now that you're scaling or transitioning, you may be legally obligated by your MNO partners or government to sign stringent SLAs — which could, for example, reduce response times from 4 hours to 30 minutes. As a result, you'll either need to renegotiate the SLA with your existing partner or identify a new partner who's able to support your digital solution at scale. Some programs simply outgrow their partners, and must make tough decisions to release old partners and find new ones that better fit the next phase.

Some digital development programs outgrow the agreements or contracts that were created when the programs first started.

### Clarify mutual goals and constraints with partners

Misalignment between partners' motivations can create challenges later. This is especially true for digital development projects, which often include NGOs, large private sector corporations (such as MNOs) and governments. Each of these stakeholder groups has different incentives for participating and metrics for success. Getting mutual clarity on these drivers and the limits around each organization's participation helps minimize the potential for future conflict and maximize the contribution each can make.

**In practice | BBC Media Action****How we negotiated scalable pan-India agreements with six MNOs**

*We negotiated pan-India agreements with six MNOs, even though we only had funding to launch our mobile health services in one state. This is because we wanted to be ready to scale quickly if the services were successful.*

*We agreed the same, significantly reduced tariffs with all MNOs, which we knew our target audiences could afford, but would still cover MNOs' network costs. We also agreed on common **short codes** and MNO marketing commitments, including promotion via digital channels and thousands of top-up shops.*

*In exchange, MNOs retained most of the revenue. We split the remainder with our aggregator to help cover costs. The revenue was too small to motivate MNOs. Instead, they saw value in our plans to build sustained, meaningful relationships at scale with a yet unsaturated target market — i.e. rural women, supported by our digital track record and BBC brand.*

*MNOs dictated the structure of our agreements, which varied from one-to-one agreements, to tripartite agreements with our aggregator, to 'piggy backing' on our aggregator's existing MNO contracts. When it came time to scale, we signed addendums to our 'master' agreements, negotiating functional and commercial changes, but sticking to the same legal terms. This significantly reduced negotiating time.*

**Other examples**

- ▶ In the **Philippines**, the Department of Health and the Department of Science and Technology made progress on the implementation of a national digital health plan. This is when they signed a memorandum of understanding (MOU) to create a **steering committee** and **technical working group** with defined roles for each national agency. The agreement led to a **health information exchange** (HIE) being established to allow interoperability between the country's various digital health solutions. It has been cited by other countries in the region as a model for creating HIEs. See the MOU [here](#).

If you're not ready to sign a formal contract with a new partner, you could agree to a **memorandum of understanding** (MoU) instead. MoUs spell out shared goals, the scope of work, roles and responsibilities and an agreed course of action. This can set the stage for negotiating a contract later.

**Good governance documentation clearly defines each partner's commitments and roles and responsibilities, and describes the structure of the intervention.**

### Revise your governance structure

In the early stage of your intervention, you may have found that a simple, informal program structure allowed for flexibility and quick decisions. But as you move into the next phase, especially one involving an ownership transition, documenting roles and responsibilities is critical.

Good governance documentation clearly defines what each partner is committed to doing (based on MoUs and other agreements), defines the relationships between them, and clarifies authority, decision-making and issue resolution processes. Once you've defined and documented your governance structure, you could codify and communicate these responsibilities in a program charter to ensure that they are formally recognized and agreed.

Governance structures are often based on MoUs and contractual agreements. The roles and responsibilities they involve are often expressed in a **RACI table**. RACI stands for responsible, accountable, consulted and informed, and a **RACI table** depicts all the activities and roles in an organization or consortium. Once you've defined and documented your **governance structure**, codify and communicate these responsibilities in a **program charter** to ensure that they are formally recognized and agreed.

## Other examples

- ▶ **Rwanda's** digital health **governance structure** is typical of a multisector digital development initiative led by government. It includes a **steering committee** of ministerial-level representatives from relevant health and ICT bodies who guide strategic decision making, a technical working group to sort through technical challenges and make recommendations and an eHealth program management unit responsible for executing decisions and day-to-day implementation. Learn more about their **governance structure** [here](#).

- ▶ Watch Amajit Mukherjee from the **International Center for Research on Women (IRCW)** talk about strategies to engage government stakeholders and support ownership transition.



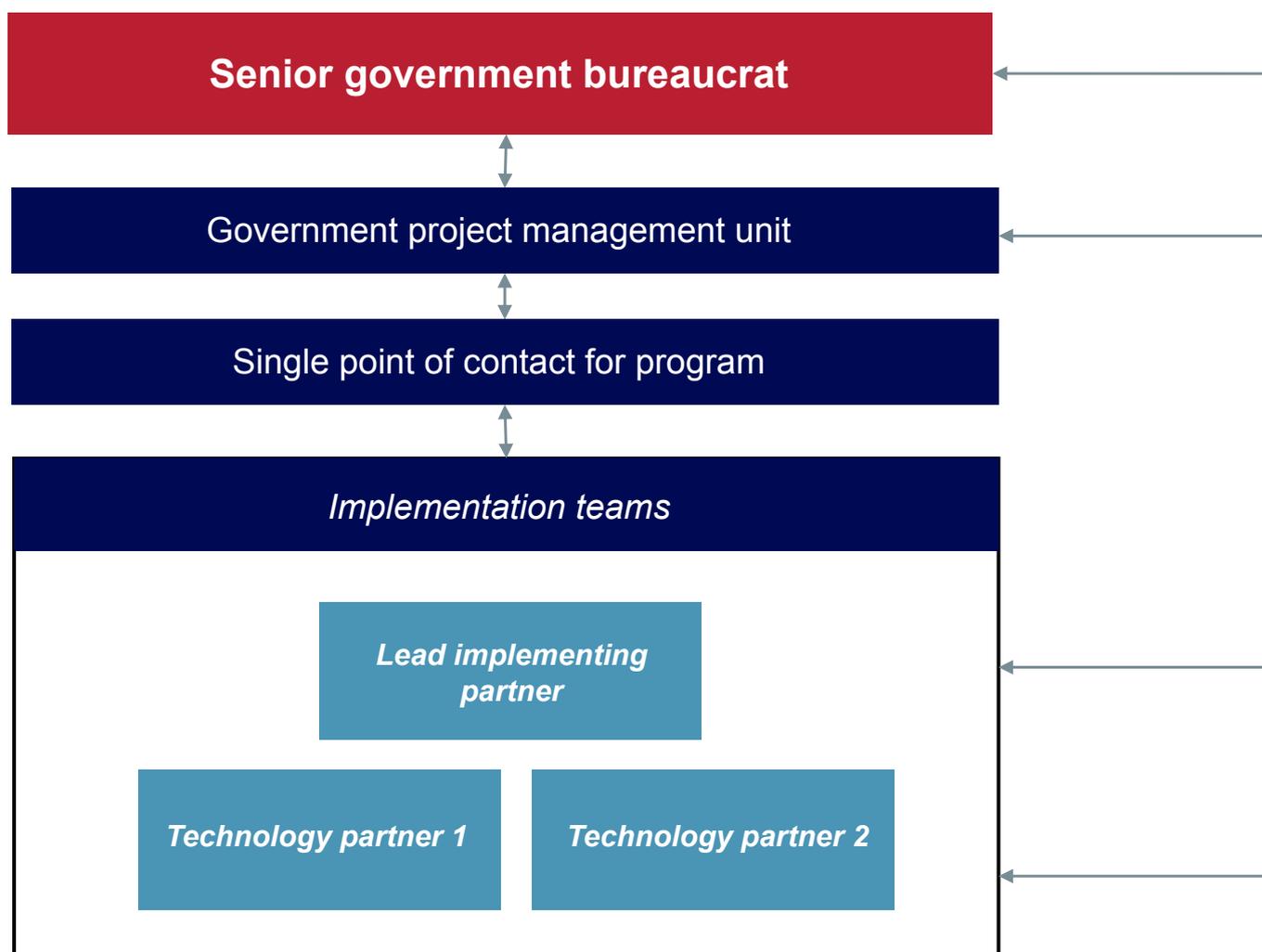
- ▶ Listen to Annie Neo Parsons from **Jembi Health Systems** talk about setting up a structure to work with government partners [here](#).

## How to

- ▶ See a sample partnering agreement [here](#) and a project charter template [here](#)
- ▶ Learn more about give/get analysis [here](#) and about key value drivers and associated proof points for partnership with MNOs [here](#)
- ▶ Learn what goes into a detailed service level agreement (SLA) [here](#)
- ▶ View a practical guide to engaging with mobile operators on digital health [here](#)
- ▶ Find guidance on creating and supporting open, honest communication with partners [here](#)

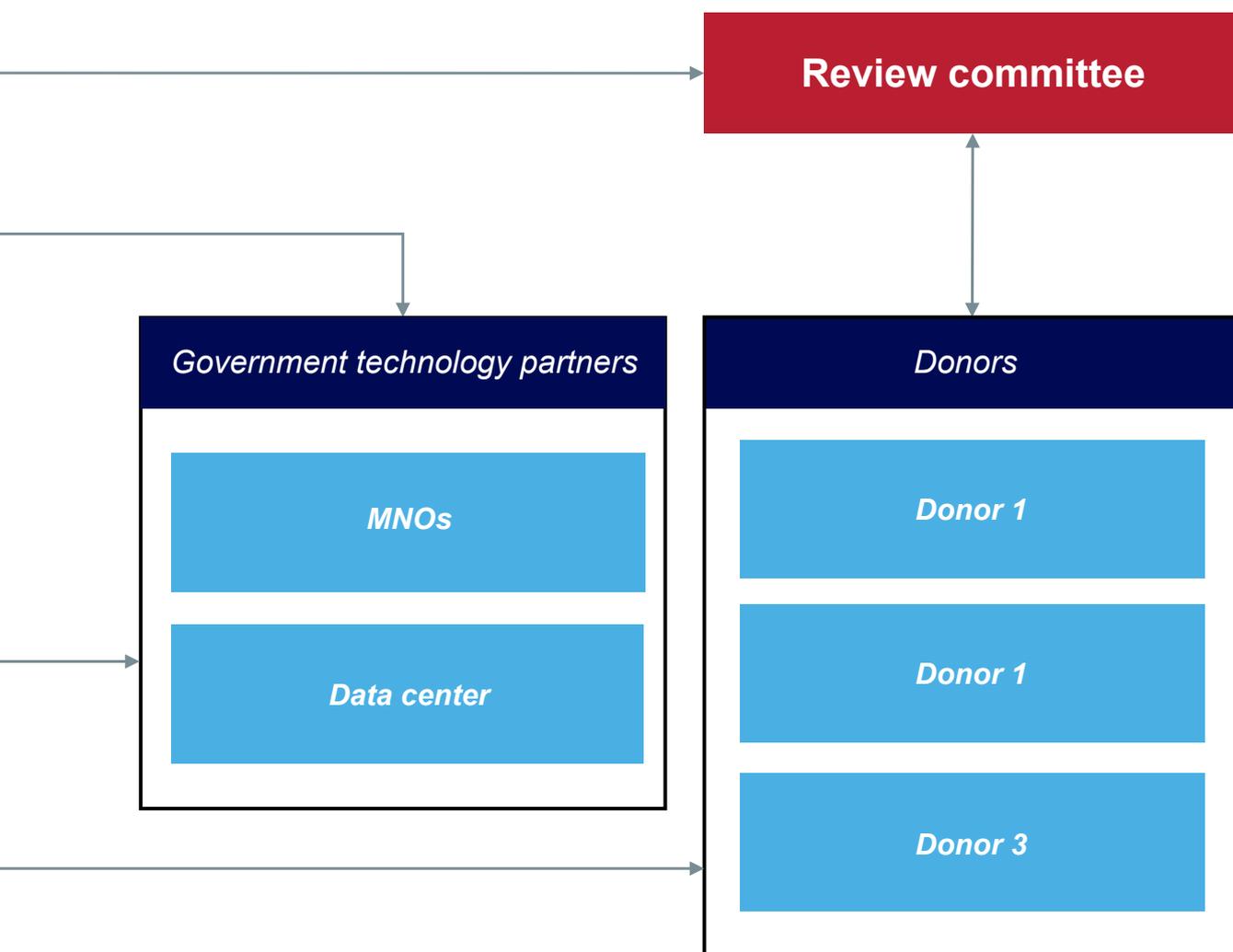
# A robust approach to governance can mean the difference between success and failure

Many challenges will arise on the path to scale and transition. Some of these will be internal — such as changing key staff and partners — and others will be external — such as new or disruptive technologies and competitors. Only by defining a clear **governance structure** and assigning specific roles to individual organizations can multi-partner programs overcome the inevitable roadblocks. Decision makers, reporting structures and escalation procedures must be defined and agreed upon with each partner. This example illustrates one such governance structure.



Documenting the roles and responsibilities of each entity in your **governance structure** (each box in the diagram here) in consultation with participating members ensures that each partner understands and accepts their responsibilities, and agrees to engage the human resources required to fulfill their commitment to the partnership. Governance documentation, which could be formalized as an MOU or a program charter, typically includes:

- **Background:** Why is the **governance structure** being created?
- **Scope and purpose:** What are the objectives of the program and scope of work?
- **Composition:** Who is involved and what skills and experience do they have?
- **Roles and responsibilities:** What are the specific functions of each partner?
- **Frequency of meetings:** How often do the different governance bodies meet?



## STEP 4

### TRANSFER KNOWLEDGE TO YOUR PARTNERS

#### Develop knowledge transfer and capacity development plans

Capacity development and knowledge transfer is not just for staff. Partners both old and new need it too, especially when there is a transition of ownership. Implementing organizations have found it useful to agree to a knowledge transfer plan with new partners, including government departments. Knowledge transfer plans involve proactively sharing and discussing documentation with partners, preferably in a series of face-to-face workshops.

The expansion of some digital solutions may require significant new or refresher training for partners, such as mobile **top-up shop** owners, who are involved in marketing and selling the solution. Many implementers note that while the cost of training partners can equal or exceed that of training internal team members, it can reduce customer service costs by improving partners' ability to communicate effectively about the solution to end users. Involve partners in developing your capacity development plan and see which of their existing training structures you can tap into.

Note that careful consideration of knowledge transfer and capacity building plans is advisable in situations where your partner could eventually become your competitor.

#### Update the way you measure partner performance

Based on **MoUs**, contracts and implementation plans, each partner's performance — including your own — will be measured against agreed deliverable milestones and established metrics. As your program goals evolve and your rollout plans change, these metrics are likely to change. It may be useful to hire an external consultancy or audit firm to review progress and provide objective feedback about program partnerships. It's often easier to share concerns and frustrations with a neutral, trusted external party than with a member of a partner consortium.

FOR MORE INFORMATION SEE:

► **Roll Out: STEP 1. BUILD PROJECT MANAGEMENT FOUNDATIONS FOR SCALE**

**In practice | BBC Media Action****Why a Program Management Unit (PMU) was established to support our national scale up**

*When we first developed our mobile health education services in India, we worked closely with state governments on strategy and messaging and training, but procured and delivered independently. This changed when we scaled to more states, where we successfully supported local governments in procurement, including contracting MNOs. This proved incredibly time consuming.*

*We learned that government is unlikely to prioritize scant resources for your project unless you walk the corridors of power every week. Government bureaucrats listen to a lot of NGO pitches, and know that NGOs come and go. We had to constantly engage to demonstrate seriousness and staying power.*

*Thus, when the Government of India decided to scale two of our mobile health education services nationally, we knew we needed a new governance structure. A project management unit (PMU) staffed by PricewaterhouseCoopers (PwC) was set up with support from the Bill & Melinda Gates Foundation to act as the single point of contact for the Ministry of Health, and to liaise between government and a consortium of partners lead by BBC Media Action.*

*PwC brought invaluable government procurement and relationship management experience to the PMU, which gave us more time to focus on scaling the services. Three months after the launch, PwC made their planned exit and we became the single point of contact for the Ministry.*

**Other examples**

▶ Watch Peter Benjamin from **Health Enabled** talk about how they support their partners.





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## Refine mechanisms for partner feedback and communication

Just as communication and feedback mechanisms are important for staff members, they are also essential for your partners. Partnerships require active and predictable channels for communication.

A robust project plan will include a communications plan, which details the frequency of partner meetings or calls and includes templates for progress reports and agendas, responsibility for drafting agendas and taking and circulating minutes and which online collaboration tools will be used. Identifying a single point of contact within each organization is also vital. If in-person meetings will be required, you'll need to be clear about who is expected to pay for meeting and travel costs and the level of representation required of each partner.

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► **Roll Out: STEP 1. BUILD PROJECT MANAGEMENT FOUNDATIONS FOR SCALE**

## Other examples

- ▶ It's important that all partners can articulate the shared goals and values of the program. Shared communication materials or assets can help with this. In Ethiopia, **Vital Wave** created a frequently asked questions (FAQ) document to help stakeholders in the Federal Ministry of Health communicate a shared vision for a digital system to manage national health indicators. See the FAQ [here](#).

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- ▶ When training partners, **Digital Green** used to focus only on technical skills and capacity building on its video-enabled approach. They have since taken a more systems-based approach to transform extension programs from the inside out. In Ethiopia, for instance, the organization partnered with local agricultural universities to create a new curriculum at schools where agricultural extension workers are trained. This enabled a broader institutional impact that is more sustainable and replicable.

## How to

- ▶ Read more about building and sustaining effective collaborations [here](#)
- ▶ See some digital tools for coordinating partnerships [here](#)

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## RESOURCE ROLLUP

### Who do you need?

Assessing your current partnerships and determining new partnership requirements will involve tapping into your organization’s resident knowledge. You may need to have multiple rounds of discussion with current and potential partners. It also entails making smart use of outside advisors and experts. These people can provide unbiased perspectives about setting up partnerships, which will help your program scale instead of holding it back.

Activity	Resource type
Partner mapping	Account or Relationship Manager, Project Director
Contract assessment and negotiation	Project Director, Digital Director or Head of ICT, VP/Director of Operations, Legal counsel (contracted)
Governance structure revision	CEO/Executive Director, Project Director, Digital Director, Legal counsel (contracted)
Partner knowledge transfer and training	Product or Relationship Manager

### Pro tips

- **Get beyond the day-to-day with partners.** When program implementation is in full swing, communication can end up limited to operational topics. Implementers say finding regular venues for strategic discussions is an ingredient to long-term success.
- **Don’t bloat your governance structure.** It’s tempting to make stakeholders feel valued by offering them a role in governance, but including too many organizations and people can lead to slow and convoluted decision-making processes. Advisory bodies can allow for inputs by all the partners involved without slowing down progress.
- **Keep your partners on message.** Making sure your partners have the right technical knowledge and strategic priorities is important, but so is ensuring they are aligned in how they communicate your program’s value.

Key step	Referenced resources
<p><b>1. ASSESS YOUR EXISTING PARTNERSHIPS</b></p>	<ul style="list-style-type: none"> <li>• Article: <a href="#">Building Your Partner Ecosystem</a></li> <li>• Toolkit: <a href="#">Partnership Tools</a></li> <li>• Article: <a href="#">Building Win-Win-Win Value Propositions</a></li> <li>• Toolkit: <a href="#">Zambia Partnering Toolbook</a></li> </ul>
<p><b>2. IDENTIFY POTENTIAL NEW PARTNERS</b></p>	<ul style="list-style-type: none"> <li>• Case Study: <a href="#">MomConnect: Launching a National Digital Health Program in South Africa</a></li> <li>• Paper: <a href="#">Partnerships in Development Practice (Multi-stakeholder Partnerships in ICT4D)</a></li> <li>• Tool: <a href="#">Partnering Assessment Checklist</a></li> </ul>
<p><b>3. UPDATE AGREEMENTS AND REVISE GOVERNANCE STRUCTURES</b></p>	<ul style="list-style-type: none"> <li>• Example: <a href="#">Philippines MOU: Creation of Joint DOH-DOST National Governance Steering Committee and Technical Working Group on eHealth</a></li> <li>• Toolkit: <a href="#">The Partnering Toolbook: An Essential Guide to Cross-Sector Partnering (Tool 3: Sample Partnering Agreement)</a></li> <li>• Toolkit: <a href="#">Planning an Information Systems Project: A Toolkit for Public Health Managers (Annex 1: Project Charter)</a></li> <li>• Report: <a href="#">Sustainable Financing for Mobile Health (Give/Get Analysis)</a></li> <li>• Guide: <a href="#">A Practical Guide for Engaging with Mobile Network Operators in mHealth for Reproductive, Maternal, Newborn and Child Health (Value Drivers)</a></li> <li>• Guide: <a href="#">How to Establish Service Level Agreements</a></li> <li>• Guide: <a href="#">A Practical Guide for Engaging with Mobile Operators in mHealth for RMNCH</a></li> <li>• Guide: <a href="#">Partnerships: Frameworks for Working Together</a></li> </ul>
<p><b>4. TRANSFER KNOWLEDGE TO YOUR PARTNERS</b></p>	<ul style="list-style-type: none"> <li>• Example: <a href="#">Ethiopia National Health Data Dictionary FAQ</a></li> <li>• Research Brief: <a href="#">Building and Sustaining Effective Collaborations</a></li> <li>• Tool: <a href="#">Technologies for Coordinating Partnerships</a></li> </ul>

Term	Definition
<p><b>Aggregator</b> Source</p>	<p>An organization that acts as a middleman between application and content providers, and mobile carriers. Provides message traffic throughput to multiple wireless operators or other aggregators; provides mobile initiative campaign oversight, and administration, as well as billing services.</p>
<p><b>Business model</b> Source</p>	<p>A plan for the successful operation of a business which identifies sources of revenue, intended customer base, products and details of financing.</p>
<p><b>Codify</b> Source</p>	<p>To establish or express in a conventional or standard form through documentation.</p>
<p><b>Digital channels</b></p>	<p>The use of digital technology to market, sell and distribute products and services.</p>
<p><b>Distribution</b> Source</p>	<p>The movement of goods and services from the source right up to the final customer, consumer or user.</p>
<p><b>Fast-moving consumer goods companies</b> Source</p>	<p>Firms that sell non-durable, relatively low-cost consumer products.</p>
<p><b>Gap analysis</b> Source</p>	<p>A process comparing an organization's actual performance with its expected performance used to determine whether it is meeting expectations and using its resources effectively.</p>
<p><b>Governance structure</b></p>	<p>A defined management framework in an organization within which decisions are made.</p>
<p><b>Health information exchange (HIE)</b></p>	<p>A mechanism for facilitating the interoperability of data systems and the sharing of data.</p>
<p><b>Landscape analysis</b></p>	<p>The process of gathering and analyzing information related to the environment in which a product, service or solution operates.</p>

Term	Definition
<p><b>Memorandum of understanding (MOU)</b> Source</p>	<p>A nonbinding agreement between two or more parties outlining the terms and details of understandings or partnerships, including each parties' requirements and responsibilities. An MOU is often the first stage in the formation of a formal contract.</p>
<p><b>Program charter</b></p>	<p>A document articulating and delineating the goals of a program, communication processes and the roles and responsibilities of participating partners.</p>
<p><b>Project management office (PMO)</b> Source</p>	<p>A group or department within an organization that defines and maintains standards for project management within the organization. The PMO strives to standardize and introduce economies of repetition in the execution of projects. Sometimes called a project management unit.</p>
<p><b>Public filings</b></p>	<p>A financial statement or other formal document submitted to a government authority.</p>
<p><b>RACI table</b></p>	<p>A matrix of all the activities or decision making authorities undertaken in an organization or consortium lined up with the individuals and partners involved in them.</p>
<p><b>Request for information (RFI)</b></p>	<p>A process that uses a standardized format for collecting information from possible vendors or suppliers.</p>
<p><b>Request for proposal (RFP) or Request for quote (RFQ)</b></p>	<p>A document used to solicit detailed proposals or bids from vendors or suppliers.</p>
<p><b>Service level agreements (SLAs)</b> Source</p>	<p>A contract between a service provider (either internal or external) and an end user that defines the level of service expected from the service provider. SLAs are output-based specifically defining what the customer will receive. SLAs do not define how the service is provided or delivered. The metrics that define levels of service should aim to guarantee: a description of the service being provided, reliability, responsiveness, procedure for reporting problems, monitoring and reporting service level, consequences for not meeting service obligations and escape clauses or constraints.</p>

Term	Definition
<p><b>Short code</b> Source</p>	<p>A short digital sequence, significantly shorter than a telephone number, that can send and receive SMS and MMS to and from mobile phones. Users send a message to a short code to receive a canned response such as a web link. Each country has its own system.</p>
<p><b>Steering committee</b> Source</p>	<p>A committee that decides the priorities or order of business of an organization and manages the general course of its operation.</p>
<p><b>Tariffs</b> Source</p>	<p>The fee charged by a telecommunications operator to its customers for use of mobile services.</p>
<p><b>Technical working group</b></p>	<p>A group of subject matter experts working together to achieve specified goals. The group is domain specific and focused on discussion or activity around a specific technical area.</p>
<p><b>Top-up shop</b></p>	<p>A business where an individual can add value to their mobile phone package.</p>
<p><b>Tripartite agreements</b> Source</p>	<p>An agreement between three parties.</p>
<p><b>Value-added services</b> Source</p>	<p>A telecommunications industry term for non-core services, such as all services beyond standard voice calls, SMS and data.</p>





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