Twinning collaboration plan template

# Objectives and instructions for the Twinning collaboration plan

Feedback received from previous Twinning arrangements indicates that advance planning and early discussion to clarify roles, expectations and practical arrangements can lead to a more successful outcome.

This collaboration plan template is designed to help Twinning partners explore the important issues by providing suggestions of items for discussion or incorporation into the details of the Twinning arrangement. Some of these items may have already been discussed when filling out the Twinning Agreement. The purpose of this document is to allow partners to elaborate upon certain points in more detail. The collaboration plan should complement and complete the information in the Twinning Agreement.

Because every arrangement will be different, not all of the categories or items described below will be relevant. It is recommended that partners agree on which sections to fill out and delete those that do not apply.

**This collaboration plan shall be completed within 3 months of the registration of a new Twinning Arrangement and returned to the TPM of the committee.** It should be reviewed on an annual basis so that Twinning partners can identify the progress made so far and update the document to reflect any changed objectives.

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| **On behalf of ISO member X** | **On behalf of ISO member Y** |
| **Full name**Click here to enter text. | **Full name**Click here to enter text. |
| **Title**Click here to enter text. | **Title**Click here to enter text. |
| **Place**Click here to enter text. | **Place**Click here to enter text. |
| **Date and signature**Click here to enter a date. | **Date and signature**Click here to enter a date. |

1. Objectives of the Twinned partner

## Instructions

A Member body that has decided to undertake a Twinning arrangement should have a precise idea of where competencies may be lacking, and which competencies it wishes to acquire as a priority. These specific competencies should be outlined below.

For competencies where training will be required, the specifics of training arrangements should be filled out in Section 4.

Partners should discuss the outlined competencies to determine whether objectives are realistic and give an estimated time frame for the achievement of each objective over the lifetime of the Twinning arrangement.

For example:

* Methods for enhancing stakeholder engagement (give specific methods, if relevant)
* How to establish national mirror committees
* How to build national consensus (for P-Member Twinning)
* How to build consensus between experts (for Convenor Twinning)
* How to organize and conduct a meeting (for Chair or Convenor Twinning)
* Dispute resolution techniques
* Voting and contributing to TC meetings
* The use of electronic tools and services (specify which ones)
* Project management skills and tools
* Drafting and/or implementing a business plan
* Knowledge of relevant statutes, rules of procedure, directives, etc.

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| **Competencies to be acquired**Click here to enter text. | **Estimated time frame for achieving each objective**Click here to enter text. |

1. Division of responsibilities

## Instructions

The premise of the Twinning arrangement is that the Twinned partner has the opportunity to learn by doing, with the benefit of guidance from an experienced Lead partner – that is, tasks and responsibilities may be divided between the two partners, thus lessening the workload of the Lead partner and allowing the Twinned partner to gain first-hand experience.

Depending on the existing capabilities of the Twinned partner, it may be able to undertake certain tasks more or less independently from the very beginning. In some cases, an initial training period may be necessary before the task can be delegated to the Twinned partner. This distinction should be kept in mind when allocating tasks and responsibilities below. (Specifics related to the kind of training to be provided can be added in Section 4.)

Partners could begin by making a complete list of tasks associated with the role in question

(P-Member, Convenor, Chair or Secretary) and then decide how tasks can be divided, noting the tasks below.

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| **Tasks and responsibilities** **(LEAD PARTNER)**Click here to enter text. | **Tasks and responsibilities** **(TWINNED PARTNER)**Click here to enter text. |

1. Communication and meeting dates

## Instructions

Openness and communication between Twinning partners is essential for an effective outcome. It is therefore recommended that partners outline from the beginning how they intend to communicate throughout the Twinning arrangement.

Twinning partners who are geographically remote or have limited resources for travel may wish to define work methods and choose tools that allow them to complete tasks remotely, for example by using telephone or Web conferencing for meetings and Livelink for document sharing and management.

See “[Resources for ISO technical work](http://www.iso.org/iso/home/standards_development/resources-for-technical-work.htm)” for information and tools designed to support the work of ISO's technical committee members.

Points to consider:

* How will information be shared and made accessible to the relevant people?

(Livelink? Other?)

* Who are the main contact people and for which subjects?

(Define the main channels of communication.)

* Which tools will be used for communication?

(E-mail, telephone conference, Web conference – and do all parties have access to these tools?)

* How frequent will communications be?

(How often do the parties expect to hear from/meet with each other? Define dates for quarterly meetings.)

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| **Communication and work methods**Click here to enter text. |
| **Dates and places of quarterly meetings**1. Click here to enter text.
2. Click here to enter text.
3. Click here to enter text.
4. Click here to enter text.
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1. Training

## Instructions

Most, if not all, Twinning arrangements will involve the Lead partner providing the Twinned partner with training in a number of different areas. From the Twinned partner’s self-assessment of their capacity building needs and discussions on Sections 1 and 2 of this collaboration plan, partners should have identified their training needs. This section allows partners to elaborate upon:

* What sort of training will be provided
* Who will provide the training
* When the training will take place (over the lifespan of the Twinning arrangement)

See also the [training services](https://connect.iso.org/x/EYHLAg) offered by ISO Capacity Building:

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| **Planned training sessions**Click here to enter text. |

1. Performance metrics

## Instructions

It is important for partners to consider how they will monitor and measure the progress and outcome of the Twinning. This will require that partners define a list of key criteria (based on the objectives outlined in Section 1 of this plan) that can be measured, either subjectively or objectively.

An example of a criterion that can be objectively measured is the “number (or percentage) of TC work items delivered on time” – this will have a defined numerical value. An example of a criterion that can be subjectively measured is the “ability to chair a meeting” – this is open to individual interpretation, but could nevertheless be assessed by rating items such as clarity, neutrality, time management, etc. on a scale from, for example, 1 = poor to 5 = excellent. Both of these criteria could be useful performance metrics for leadership Twinnings.

**NOTE:** There is certainly no requirement to develop very detailed or complicated performance metrics (e.g. that are computed using mathematical methods) for the purposes of monitoring a Twinning.

[Annex SQ](https://www.iso.org/sites/directives/2017/consolidated/index.xhtml#_idTextAnchor623) to the ISO/IEC Directives, Part 1, and Consolidated ISO Supplement, contains information on the selection criteria for people leading the technical work. These criteria may prove useful when developing performance metrics for leadership Twinnings. ISO also has a [guidance document](https://isotc.iso.org/livelink/livelink/fetch/2000/2122/15507012/19587784/PMM_-_Roles%2C_responsibilities_and_capability_requirements.PDF?nodeid=19588324&vernum=-2) related to Project Management, which outlines roles and responsibilities of committee leadership in this regard.

Guidance on how to develop performance metrics (using an example that could be relevant for

P-Member Twinning):

* Start with the objectives outlined in Section 1
* Example: Voting and contributing to TC meetings
* For each objective, define one or more actions that would enable the objective to be attained
* Contributing (directly or by correspondence) to TC meetings
* Voting in TC ballots
* Improving national input through better stakeholder consultation
* Translate each action into a performance metric by defining how it will be measured
* Contribution to TC meetings > Objective measurement = percentage of TC meetings in which the Twinning partner participated
* Voting in TC ballots > Objective measurement = number of votes cast by Twinning member as a percentage of total TC votes
* Improving national input > Objective measurement = increase in the number of stakeholders participating through national mirror committees OR number of participating stakeholders as a percentage of the total number of relevant stakeholders in the country

At the yearly review of the Twinning arrangement, partners should use their performance metrics to measure their progress so far. Results from this analysis can then be used to update this collaboration plan, if necessary.

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| **Proposed performance metrics**Click here to enter text. |