[Insert organisation name/logo]

# PARTNERSHIPS ENGAGEMENT CHECKLIST

**[Insert organisation name]** enters into a range of external partnerships as a way of working with other organisations or groups of organisations for the benefit of **[insert organisation name]** clients, stakeholders and/or other partners. Partnerships may take the form of joint project ventures, strategic alliances, advisory group membership, forums or collaborative activities. This list is by no means exhaustive or mutually exclusive.

**[Insert organisation name]** may enter into a specific type of relationship with an individual, group or organisation and have a partnership with the same individual, group or organisation for a different purpose.

The checklist below provides some guidance on identifying, developing, maintaining and ending relationships with other organisations or groups of organisations.

|  |  |
| --- | --- |
| **Identifying partnerships** | **Comments** |
| **The need to partner:**   * Are there clear and sound reasons for developing a partnership? * Will partnering with other organisations or groups of organisations improve or benefit the issue for **[insert organisation name]** and/or its clients/stakeholders? * Will the partnership’s objectives and purpose be consistent with **[insert organisation name]**’s mission? * Will the investment made in a partnership be outweighed be the benefits? * Is a partnership a cost and resource effective way to achieve benefits sought? * Is partnering an ‘added value’ activity? |  |
| **Selecting partners:**   * Who has the skills, positioning and/or resources to contribute to the partnership? Do they have the capacity to work in partnership? * Do the prospective partners have a shared vision of the benefits of the partnership? * What is the experience of working with particular partners? * Are there any partners that have not previously been considered? |  |
| **Developing partnerships** | **Comments** |
| **Types of partnerships:**   * What type of partnership is needed, e.g. joint venture, collaborative group with specified purpose, strategic alliances, forums, advisory group, shared activities? * Will the partnership be an informal relationship or association? * Will the partnership be a formal relationship? How will this be demonstrated – ‘MOU’, ‘Working Agreement’, ‘Intention to Collaborate’? |  |
| **Purpose of the partnership:**   * Do all partners have a clear and shared vision of the relationship? * What is specifically to be achieved by the partnership? * What activities will the partnership undertake? * Does the partnership focus on issues and their solutions? * How will the partnership know it has achieved its purpose? |  |
| **Partner contribution:**   * Have the roles, responsibilities and expectations of the partnership been agreed to and made clear for all partners? * Have the resources and financial contributions been identified? * Will all partners be involved in the planning of the partnership? |  |
| **Maintaining partnerships** | **Comments** |
| **Structure of the partnership:**   * How will the partners meet and work together? Will there be regular, planned meetings with set agendas? * Who does the partnership report to? How do they report? * What information will be shared and how? * How will the partners communicate with each other? * Is there a code of conduct to guide the partners in the relationship? * How will equality in the partnership be achieved? * Who else should know about the partnership? |  |
| **Confidentiality:**   * Has the partnership discussed and agreed to what information is confidential? * Are there strategies in place to support confidentiality? * How will a breach of confidentiality be addressed? |  |
| **Conflict management:**   * What processes are in place for resolving disputes between partners? * Who will take the lead in resolving conflict? |  |
| **Review of the partnership:**   * Are there processes for recognising and celebrating achievements? * How can achievements from the partnership be shared? * Does the partnership review its purpose and processes regularly? |  |
| **Ending partnerships** | **Comments** |
| * Is there a defined end point for the partnership? * How will the partners finalise the relationship – both planned and unplanned? * How can achievements from the partnership be shared? * How will the partnership influence future partnerships? |  |