[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.

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| **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 by the benefits?
* Is a partnership a cost and resource effective way to achieve benefits sought?
* Is partnering a ‘value adding’ activity?
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| **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?
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| **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’?
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| **Purpose of the partnership:** * Do all partners have a clear and shared vision of the relationship?
* What is to be achieved by the partnership, specifically?
* 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?
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| **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?
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| **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?
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| **Confidentiality:** * Has the partnership discussed and agreed on what information is confidential?
* Are there strategies in place to support confidentiality?
* How will a breach of confidentiality be addressed?
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| **Conflict management:** * What processes are in place for resolving disputes between partners?
* Who will take the lead in resolving conflict?
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| **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?
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| **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?
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