

Working with partners: Considerations



Catalyst and identification:

- If your charity works with partners often, does it have procedures to ensure that it does so consistently, effectively and efficiently – such as a partnership policy, a partner selection checklist, and a due diligence checklist?
- Is working with another organisation the best option?
- Has your charity considered the nature and purpose of the organisation it is thinking of working with, and how the organisation aligns with its strategic direction and mission?
- Has your charity considered the type of working relationship that might be most appropriate for the desired outcomes? For how long will this arrangement last?
- Are these considerations documented?

Entering an agreement

- Does your charity have a due diligence process for checking the partner organisation?
- Has your charity comprehensively considered the legal and contractual implications?
- Has your charity agreed to a contract that is in its best interests and accurately reflects the nature of the partnership?
- Has your charity considered the exit strategy?
- Has your charity sought external expert advice and guidance where necessary?

Monitoring the relationship

- Does your charity have a way to monitor the progress of the partnership?
- Does your charity review the performance of the partnership?
- Does your charity keep up to date with relevant legislation that affects the partnership?
- Does your charity keep detailed records of all aspects of the partnership?

Renewal or exit

- Does your charity have a way to decide whether to renew or end a partnership?
- Will your charity use the exit strategy it writes at the outset of the partnership?
- Has your charity considered adjusting the partnership, or has it identified new opportunities?
- Has your charity reflected on the partnership and documented the lessons to take from it?