

Making Successful Partnerships

Early Stages Partnership Checklist

What is the Issue?	Have you considered this and what is your answer?	What needs to be done?
Recognise your purpose		
What do each of the potential partners exist to do?		
What will the partnership exist for?		
Do you have shared aims and principles?		
Why are you forming the partnership?		
Be true to your principles		
What systems do you have in place to ensure that you are true to your principles and purpose?		
Will your proposed structure achieve the purpose of the partnership?		
Other Funding		
Do you know what funding streams the potential partners have?		
Do your proposals put other funding streams at risk?		

Economies of Scale/Financial Benefits		
What are the financial benefits of working as a partnership?		
What resources, such as property or staff, can you share?		
Are funders looking for economies of scale and how will you achieve them?		
Is the partnership allowed?		
Is the proposed partnership allowed under your Trust deed or Constitutional Documents?		
Is the proposed partnership allowed by your professional conduct rules (e.g. the Solicitors' Practice Rules)?		
Is the proposed partnership restricted by any representative body memberships that you hold?		
Are there any other restrictions that will stop you forming a partnership?		
Disclosing Information		
Is the information subject to legal professional privilege?		

Is the information Commercially sensitive?		
Is the information subject to the Data Protection Act		
Do you need a confidentiality agreement?		
Due Diligence		
Have you shared information about your purpose, values and aspirations?		
Have you shared information about your detailed financial situations, for example assets, liabilities, income?		
Have you shared details of your internal policies and procedures, for example complaints procedures?		
Have you shared information about your staff, for example numbers, salaries, conditions of employment, outstanding disciplinary actions or tribunal matters?		
Have you shared information about your performance and quality procedures, for example details of any audit failures,		

complaints or prosecutions?		
Have you shared information about your IT systems and telephony?		
Have you shared information about other partnerships and consortia with which you are involved (as a member or otherwise)?		
Branding		
Do you have to develop a new brand/image for your partnership?		
How will you maintain your existing brand recognition?		
Conflicts of Interest		
Have you considered conflicts of interest?		
How will you identify conflicts between partners?		
What will the impact be on clients?		
How does conflict avoidance affect your systems?		
Data Sharing		
What data will the partners share between them?		

Are data sharing plans consistent with each partner's Data Protection registration and obligations?		
How will you restrict access to data where there are conflicts of interest?		
What is the effect of legal professional privilege?		
Do you need to change the wording of your client care letters and get consents from your clients to share data?		
Diaries, Appointments & Case Management		
How will the partnership manage diaries?		
Can each partner easily make appointments for a client to see advisers from the other partners?		
Will the client have to travel from one location to another?		
If so, how will this appear to the client and funders?	?	
Where will the client's files be kept?		
Technology		

Will you be using the same electronic case management protocols and systems across the partnership?		
Will your telephone systems work together and can you easily transfer calls between partners?		
Are you using the same operating systems and versions of software? Can you read each other's documents?		
How will you provide management information or partnership claims information?		
Have you considered the IT support and software licenses you will need?		
Quality Standards		
What quality standard will the partnership seek to meet?		
How will you ensure that all partners meet the standard?		
How will you share expertise and systems to the benefit of all partners?		
What will you do if one or more partners can't meet the standard?		

Governance		
What will your governance structure be?		
Does it allow for prompt decision-making?		
Will individual partners have to delegate decision-making responsibility to the partnership management?		
What will the limits of that delegated authority be?		
Should one partner take the lead?		
Is there an individual within the partnership who should manage any contracts for it?		
Problem & Dispute Resolution		
What systems will you have in place to identify problems and disputes between partners early and to stop them escalating?		
What process will you have in place to resolve disputes?		
Do you need external/independent involvement in dispute resolution?		

What sanctions are available if a member breaches the partnership agreement?		
Are your processes fair, transparent and robust, sufficient to withstand legal challenge?		
Termination & Contingency		
When will the partnership come to an end?		
How can you end it before that time?		
What happens to the contracts/funding when it ends?		
What happens if one partner wishes to leave? Does this bring the whole partnership to an end?		
What happens if one of the partners runs into financial difficulties or can no longer participate in a particular contract?		
What happens to the partnership's shared resources when it ends?		
What happens to the partnership staff?		
The Future		
If you are going to bid for a new contract, is		

the partnership fit for purpose?		
Do you need to go back to the beginning?		