

Board Checklist for Planning Collaboration

Here are some questions a board will need to ask. Collaborative working usually means joint working by two or more organisations in order to fulfil their purposes, while remaining as separate entities. Agreements may range from the very informal to the large-scale e.g. for service delivery contracts. Sometimes the decision to work together can lead to a formal merger.

This board checklist is a simple guide to typical questions your board will need to ask when considering collaborative working. Boards and senior executives must act in the interests of their organisation and in accordance with their Memorandum and Articles of Association. This means that they should be satisfied that there are adequate benefits for the organisation and its clients from working in collaboration with others.

Questions for the Board to Consider	Comments/Action Plan
Initiating Collaboration	
How can we better meet the needs of our organisation by working with others?	
How will potential partners be identified? Do we have an existing relationship with them?	
Is the proposed partner's organisation compatible with us in terms of its objects, culture, governance, structures and resources?	
Have we a clear reason for collaborating? What is the rationale? What will or might our organisation gain and lose from the collaboration? Have we considered any wider impacts e.g. to reputation?	
Have we approached stakeholders for their views, especially clients, users or beneficiaries?	
Does the collaboration further our objectives and is it an appropriate use of our resources?	
Are there any significant risks and have we a plan to carry out any form of due diligence?	
Approaches to Collaboration	
What level of board involvement do we want in planning and decision-making in regard to the collaboration?	
Have we considered what type of agreement will be appropriate for our needs?	
Do we need to take professional advice about the type and content of any agreement?	
Does the agreement state clearly:	

collaboration objectives, boundaries, roles and responsibilities, benefits for each party, duration and funding arrangement?	
Have we established a steering group or project board to oversee the collaboration project? Is there a named project leader?	
Have we established a project plan with milestones?	
Have we established risks and mitigating measures?	
Have we set out the costs and how these will be resourced? These should include staff time, rebranding, professional fees, relocation etc.	
Have we conducted a stakeholder analysis and established a communications plan that covers all relevant stakeholders and audiences?	
How will we manage any joint branding and promotion?	
Have we identified clear measures to monitor the success of the collaboration? Is there an evaluation process in place?	
Have we developed an exit strategy for ending the collaborative arrangement should circumstances change?	