# 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.

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| **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? |  |

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| 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? |  |