

BABERGH DISTRICT COUNCIL

FROM: Deputy Chief Executive

REPORT NUMBER: **J88**

TO: **STRATEGY COMMITTEE**

DATE OF MEETING: 17 September 2009

PROPOSED PARTNERSHIP STRATEGY

1. PURPOSE OF REPORT

- 1.1 This report seeks Strategy Committee approval to a Partnership Strategy for Babergh.
- 1.2 Babergh recognises the importance of partnership working and the benefits it can bring in the shaping, commissioning and delivery of services for local people, and achieving more efficient and effective use of resources.
- 1.3 Babergh already has a successful track record in partnership working, which is likely to grow as the Council responds to the need to generate substantial efficiency savings over the next three years.
- 1.4 In view of the fundamental and growing importance of partnership working to Babergh, and in view of the emerging Use of Resources Assessment, it is recommended that Babergh adopts a formal Partnership Strategy.

2. RECOMMENDATION

- 2.1 That the Committee adopts the attached “Babergh District Council Partnership Strategy”.

The Committee is able to resolve this matter.

3. FINANCIAL IMPLICATIONS

- 3.1 The adoption of the Strategy will ensure the Council’s resources are used effectively and efficiently in the area of partnership working and that those partnerships deliver the required outcomes and benefits for the communities we serve.

4. RISK MANAGEMENT

| Risk Description | Likelihood | Seriousness or Impact | Mitigation Measures |
|--|--|------------------------------|---|
| BDC resources committed to partnerships are ineffective or inefficient and partnership fails to deliver the required benefits for the communities we serve | Low (but at a time of reducing resources could, in the absence of the strategy, move to significant) | Critical | Strategy and its “toolkits” builds upon and improves current arrangements for the effective management and delivery of partnerships |

5. **KEY INFORMATION**

5.1 The draft Strategy is attached.

5.2 The Strategy is in two parts setting out the arrangements for:

- Forming new partnerships – Appendix 2 of the attached Strategy will be completed for all proposed new significant partnerships and be subject to the approval of Strategy Committee.
- Monitoring and reviewing existing partnerships – Appendices 3 and 4 of the attached Strategy will be completed for all existing significant partnerships and these will be reviewed and scrutinised by the Council's Overview and Scrutiny (Community Services) Committee on an annual basis.

The Strategy also defines the difference between significant and other partnerships and provides a matrix for achieving this.

5.3 The Strategy has been aligned with those recently proposed by St Edmundsbury Borough Council and Forest Heath District Council. It is proposed that the Strategy and its toolkits are implemented and their effectiveness reviewed in partnership with these two Councils.

5.4 In addition, the Strategy includes relevant sections from the County Council's approach to partnership working.

5.5 An Equality Impact Assessment has been carried out on this Strategy and it was found that there are no negative impacts. The Strategy should benefit local people as it will help to ensure that the Council's partnership work effectively and efficiently meets local need in the shaping, commissioning and delivery of services.

6 **APPENDICES**

Proposed Partnership Strategy

7 **BACKGROUND PAPERS**

None

CONTACT: Mike Hammond

Email: mike.hammond@babergh.gov.uk

DRAFT

**BABERGH DISTRICT COUNCIL
PARTNERSHIP STRATEGY**

September 2009

Partnership Strategy

1. Introduction

- 1.1 Babergh recognises the importance of partnership working and the benefits it can bring in the shaping, commissioning and delivery of services for local people and achieving more efficient and effective use of resources. The Council is involved in a number of partnerships that continue to evolve and many more partnerships are likely to be formed in the future. These partnerships vary in size and scope.
- 1.2 The Council's commitment to partnership working is reflected in its Strategic Priorities and 3-year/1-year Plans which set out our commitments, priorities and shared vision for future partnership working. Partnership working has also been identified as a key theme in the Improvement Plan.
- 1.3 In particular, the Council recognises the importance of Local Strategic Partnerships (LSPs) in providing a forum for local councils and other local agencies to create a shared vision and shared sense of priorities for a place.
- 1.4 Through this Partnership Strategy, the Council will therefore set out its long term vision for successful partnership working and define clear guidance for future partnership arrangements and ensure that existing partnerships are monitored and reviewed appropriately.

2. The Structure of the Partnership Strategy

- 2.1 This strategy is written in two main parts:-
 - (1) the key principles for ensuring a successful partnership, the definition of a partnership, including significant partnerships and why we work in partnership; and
 - (2) partnership governance arrangements, toolkits to assess whether a partnership should be entered into and the methods for monitoring and reviewing existing partnerships.

Part 1: This section looks at the key principles for ensuring a successful partnership, the definition of a partnership, including significant partnerships and why we work in partnership.

3. What is a Partnership?

3.1 The Audit Commission's definition of a partnership is a joint working arrangement where the partners:-

- (a) are otherwise independent bodies;
- (b) agree to co-operate to achieve a common goal;
- (c) create a new organisational structure or process to achieve a goal;
- (d) plan and implement a jointly agreed programme, often with joint staff or resources;
- (e) share relevant information; and
- (f) pool risks and rewards.

3.2 A partnership is **not** one of the following:-

- (a) a consultative or advisory group or panel with no direct delivery function; or
- (b) a co-ordinating body or board set up to oversee delivery of outcomes by a collection of other partnerships, unless it is a Local Strategic Partnership.

3.3 It should be noted that the partnerships which involve a contractual arrangement whereby one partner provides goods or services to the other in return for payment will NOT be subject to this strategy. These types of partnership will be governed by the Council's Procurement Strategy and rules.

4. Significant Partnerships

4.1 It is important to clearly state the definition of a 'significant partnership' as formal agreements must be in place for these partnerships and they will be subject to a greater level of review and monitoring than the council's other partnerships, as explained at section 9. The Council's significant partnerships meet one or more of the following criteria:-

- (a) a statutory partnership;
- (b) one which delivers key services or outcomes on behalf of the Council, but is not a contractor;
- (c) one which fundamentally assists the Council in delivering one or more of its priorities, where the Council has a lead role or a duty with respect to that priority;
- (d) one which plays a fundamental role in delivering a project, scheme, or progressing an initiative (e.g. central government priority) for which the Council is the responsible body;
- (e) one which receives direct financial and/or other resources or support from the Council in order to achieve agreed community priority results; and
- (f) one which, through failure or inadequacy of its operations, could put the Council in a position of public or commercial liability, significant public criticism, or loss of reputation.

4.2 An assessment scorecard has been developed to determine the significance of partnerships. The matrix for determining whether a partnership is significant is attached as **Annex 1**.

5. Why Work in Partnership?

5.1 Partnership working is becoming increasingly important to ensure that services are delivered to local people and communities in an effective way and making the best use of the available resources. There are a number of instances where partnership working is also now a statutory requirement.

5.2 Effective partnership working can bring with it numerous benefits which include:-

- (a) building on the strengths of organisations allowing them to pool resources, avoid duplication, and maximise impact;
- (b) filling service gaps and increasing access to services for vulnerable and minority groups;
- (c) attracting new resources and using them efficiently; and
- (d) supporting the Council's corporate priorities.

6. Key Principles for Success

6.1 Successful partnerships can bring huge benefits to the partner organisations involved and the communities and local people that they seek to help and support. As a guide, the following principles are essential for successful partnerships:-

- (a) recognition of a need for a partnership;
- (b) respect of the needs of the individual organisations in the partnership should be established and promoted;
- (c) strong and consistent leadership supported by simple management structures;
- (d) specific shared business objectives;
- (e) robust risk assessment including the implementation of a joint risk register, and appropriate action taken at each stage of the partnership i.e. setting priorities, policy making, financial planning and managing performance;
- (f) establishment of an agreed decision making process;
- (g) commitment to continuous improvement and benefits which should be established and clearly measurable;
- (h) a formal assessment and development process should be in place;
- (i) formal review processes should be in place to monitor the continuing effectiveness of the partnership, progress against objectives and the continued effectiveness and relevance of the partnering bodies; and
- (j) clearly defined exit arrangements.

Part 2: This section sets out partnership governance arrangements, how new partnerships should be formed and existing partnerships reviewed and monitored.

7. Partnership Governance Arrangements

- 7.1 Arrangements should be in place to ensure that partnerships, particularly significant partnerships, are subject to an appropriate level of governance. The maximum governance arrangements should be applied to significant partnerships as defined using the matrix attached as **Annex 1**.
- 7.2 When assessing the need for governance arrangements, ‘the crucial issue is the extent to which failure of the “partnership” could have a detrimental impact on the organisation’.¹ Therefore, governance arrangements applied to other partnerships will be carried out proportionately.

8. Forming New Partnerships

- 8.1 It is important to consider whether a new partnership is required and if it will satisfy all criteria in the definition of a partnership as detailed in section 3.
- 8.2 When forming a new partnership, the Corporate Management Team (MT/HoS) will need to become involved. The document ‘Forming New Partnerships’ attached as **Annex 2** should be completed once the Head of Service is satisfied that establishing a partnership is the best approach. The completed form should then be presented to MT/HoS) and the steps outlined below then completed:

| Development of the new partnership | Approval required/Guiding principles |
|---|---|
| It has become clear that there is a need to form a new partnership | MT/HoS should be consulted before any significant work is undertaken to form the partnership. Once MT/HoS has approved the partnership in principle, the following actions should be undertaken: <ol style="list-style-type: none"> 1. Agree a shared, clear vision that defines the purpose of the partnership. 2. Define the roles and responsibilities of each partner. 3. Determine what resources each partner has available for the partnership. 4. Obtain the appropriate level of support and commitment from each partner. 5. Define clear tasks that have measurable outcomes. 6. Determine whether the partnership is a ‘significant partnership’ by using the matrix attached as Annex 1. |
| The initial six steps in the guiding principles have been satisfied | MT/HoS should again be consulted and if it is agreed that the partnership should proceed, then approval should be sought from Strategy Committee. The following steps should then be undertaken: |

¹ The Annual Governance Statement (AGS) Rough Guide, Appendix B1 – Partnerships – Suggested approach and determination.

| | |
|--|--|
| | <ol style="list-style-type: none"> 1. Establish a governance structure that ensures open and active decision-making by the partners. 2. Create opportunities for partners to establish working relationships. 3. Set up a structure for communication within and outside the partnership. Take into consideration a website, contact details and media release. 4. Design a monitoring plan. |
|--|--|

9. Reviewing and Monitoring Existing Partnerships

- 9.1 All **significant** partnerships that the Council is involved with should be reviewed and monitored to assess whether progress is being made against the stated objectives, the structure of the partnership is still relevant and serving the stated purpose.
- 9.2 Attached as **Annexes 3** and **4** are partnership self-assessment tools which should be completed by significant partnerships on an annual basis. **Annex 3** 'Partnership Evaluation: Self-assessment' focuses on performance management and outcomes that have been achieved by the partnership. **Annex 4** 'Corporate Guidelines: A checklist for existing partnerships' focuses on the governance arrangements of a partnership.
- 9.3 The results of the self-assessment, together with any relevant actions should then be discussed by the whole partnership.
- 9.4 **Annexes 3** and **4** represent the maximum amount of paperwork that would be needed for reviewing significant partnerships. The same principles would be applied proportionately, taking into account financial implications and risks, with a 'light touch version' when reviewing other less significant partnerships.

Annexes

Annex 1: Partnership Significance Assessment Scorecard

Annex 2: Checklist for forming new partnerships

Annex 3: Partnership self-assessment tool

Annex 4: Checklist for existing partnerships

Forming new partnerships

Before entering into a partnership, the Council will need to formally consider the business case for the partnership using the criteria set out in the following tool. The Council will only establish or join a partnership if it is satisfied, through use of the checklist, that a partnership approach is the most appropriate and efficient method for delivering the stated objectives.

Factors indicating that a partnership is not the best approach

- The topic proposed is primarily the responsibility of one partner with others having only a marginal interest or role;
- Partners have no shared objective in relation to the topic
- Partners have a history of poor relationships and have not made a commitment to change this; and
- Agencies want to shunt cost or blame problems on one another – that is, there is a hidden negative agenda.

1. Partnership Details – key information

Partnership name: Enter name

BDC Lead Officer: Enter name

Is the partnership statutory? Yes No

Main function of proposed partnership: Please select

Bodies to be represented on partnership: Please specify

Who will lead the partnership? Please specify

What is the intended lifespan of the partnership? Please specify

What is the expected role and contribution of the council?

Please specify

What are the risks to the council, who will manage them and how?

Please specify

What is the exit strategy for the partnership and for the council?

Please specify

2. Corporate Fit

What are the key aims and objectives of the proposed partnership? Please specify

Do the proposed objectives of the partnership fit with one or more of the Council's corporate priorities? (Tick as appropriate)

| | Yes | No | If yes, please specify how Partnership will help the council achieve its corporate objectives |
|---|--------------------------|--------------------------|---|
| 1) A greener cleaner Babergh | <input type="checkbox"/> | <input type="checkbox"/> | Please specify |
| 2) Quality homes local people can afford | <input type="checkbox"/> | <input type="checkbox"/> | Please specify |
| 3) A safer and healthier Babergh | <input type="checkbox"/> | <input type="checkbox"/> | Please specify |
| 4) A strong sustainable Babergh economy | <input type="checkbox"/> | <input type="checkbox"/> | Please specify |
| 5) Vibrant places and communities | <input type="checkbox"/> | <input type="checkbox"/> | Please specify |
| Has our Equality Impact Assessment on the objective of the partnership been undertaken? | <input type="checkbox"/> | <input type="checkbox"/> | Please specify |

3. Membership

Yes No

Has a list of partnership Members been agreed?

Have the voting powers of all Members been agreed?

Has a protocol on how disputes will be resolved been agreed?

4. Need

Why is the partnership necessary? (e.g. required by statute, response to Government policy, ability to access new funding)

Please specify

Why is a partnership the best way of meeting this need?

Please specify

Outcome of consultation with communities, service users, partners?

Please specify

Can you identify potential links and overlaps with an existing partnership?

Please specify

Is there already a partnership in place with a similar remit, which can take on this work? Or could an existing partnership be adapted to deliver the outcome instead?

Yes No

Do prospective partners have a clear and shared vision of the benefits that the partnership is intended to achieve and how this has been developed?

Please specify

Is this vision realistic given the resource and opportunity open to the proposed partnership?

Please specify

5. Cost/Benefits

What are the anticipated costs and benefits (direct and indirect) of the partnership?

Please specify

How will the costs and benefits be measured? Please specify

Could the benefits be achieved in a similar or more cost-effective way?

Yes No **if no**, Please specify

Are there any alternative options for delivering the benefits?

Yes No **if yes**, Please specify

6. Resources

What are the resource implications (staff, capital and revenue funds, use of assets, venue for meetings)?

Please specify

Which organisation will manage the administration, finance and governance issues i.e. agendas, minutes, website?

Please specify

Have lead officers been identified by the council and partners?

Please specify

How will the council resource its participation?

Please specify

Are there other sources of funding available?

Please specify

Are all the partners willing to devote the necessary time and effort to making the partnership succeed? Yes No

7. Performance Management

Who will have responsibility for production of management and performance information within the partnership, and at what frequency will this be reported to the partnership?

Please specify

Have the risks to the achievement of the partnership objectives been identified and proposals made for the management of those risks?

Please specify

8. Recommendation

What is your recommendation: Should the council join the partnership?

Please specify

Do members or officers who will be representing BDC require any further support to carry out the role?

Please specify

BDC Partnership Evaluation: Self Assessment

Established partnerships should use this tool for self assessment on an annual basis.

Date of Assessment:

Name of person completing the form: (To be the lead officer for the Partnership)

1. Partnership Details

Partnership name: Enter name

Main function of partnership: Please select

Is the partnership Statutory? Yes No

Date partnership began: Please specify

Bodies represented on partnership: Enter details

What are the overall costs of the partnership? Enter Amount (£)

What are the statement aims and objectives of the partnership?

Please specify

2. Decision making and delegated responsibilities

To be completed by the lead officer

| | Strongly agree | Agree | Disagree | Strongly disagree | Comments |
|---|--------------------------|--------------------------|--------------------------|--------------------------|----------|
| You have enough authority to bring about any service improvements that arise from the partnership and feel confident in implementing these. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| The extent to which you can commit the Council to action is clear | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| You are clear about your role in the partnership | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| You are clear about what resources have been allocated to this work? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

What are the links between decision making in the partnership and decision making in the council? Please specify

Is there another partnership or organisation that deals with the same or similar issue?
 Yes No

If yes, could the objectives be met through that partnership or organisation instead?
 Yes No

3. Outcomes and clarity of purpose

Has the partnership established common priorities and targets and agreed actions, leading to demonstrable improvements against measurable targets?

| | Strongly agree | Agree | Disagree | Strongly disagree | Comments |
|--|--|--------------------------|--------------------------|--------------------------|----------|
| 1. The partnership has a shared set of values and a clear agreed vision of what it wants achieved | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. The partnership has established aims and objectives and has an agreed and realistic action plan to achieve them | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. These are complementary to the aims and objectives of the council | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. Partnership working is the best way of delivering these objectives | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 5. Partners are clear about their role in delivering the partnerships aims | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 6. The partnership can demonstrate that it is delivering outcomes. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 7. It is clear why the council is involved | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 8. There is a signed partnership agreement which clearly defines the responsibilities of the partnership and of the partners | Yes <input type="checkbox"/> No <input type="checkbox"/> | | | | |

What have been the partnerships substantial achievements?
Please specify

4. Efficient

How does the partnership ensure that resources are used as productively as possible?

| | Strongly agree | Agree | Disagree | Strongly disagree | Comments |
|---|--------------------------|--------------------------|--------------------------|--------------------------|----------|
| 1. The full costs of running the partnership are known | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. There are sufficient financial resources to enable the partnership to meet its aims and objectives | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. There are sufficient staff resources to enable the partnership to meet its aims and objectives | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. Delivery costs compare favourably with similar organisations | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 5. The partnership has effective support and administration arrangements | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 6. Meetings are effective and timetabled | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 7. Partners communicate with each other regularly between meetings | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 8. Partnership members reflect the views of the organisation they represent | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 9. The reason why each partner is engaged is understood and accepted | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

The partnership has an agreed means of demonstrating Value for Money (VFM)?

Yes No

What evidence is there that participation in the partnership represents VFM for the council?

Please specify

Have other partnerships or options been evaluated as an alternative?

Yes No **If yes**, please specify

Are the costs of the partnership actively monitored and weighed against the benefits that the partnership delivers?

Please specify

Does the partnership make use of joint procurement to achieve environmental, social and economic benefits? How?

Please specify

Has the partnership considered when its work is likely to be complete, and how it will end/hand over its work when this point is reached? Yes No

5. Inclusive

Does the partnership actively involve all key players, including the public, private, community and voluntary sectors and service users?

| | Strongly agree | Agree | Disagree | Strongly disagree | Comments |
|--|--------------------------|--------------------------|--------------------------|--------------------------|----------|
| 1. The partnership ensures that its membership reflects the purpose of the partnership | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. The partnership ensures that all partners have the capacity to be fully engaged | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. The management and chairing of the partnership provides an inclusive impartial view | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. The chair of the partnership provides clear and visible leadership | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 5. The partnership works democratically and is accountable to its stakeholders | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 6. The partnership addresses the needs of disadvantaged areas and groups | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 7. The partnership's decisions are open to scrutiny, e.g. public meetings, minutes recorded and publicly available | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

Has the partnership completed equality impact assessments of its plans, policies, functions, projects etc? Which ones?

Please specify

Has the partnership indentified any equalities issues? How have these been dealt with?

Please specify

6. Managing performance

How the partnership manages its performance in relation to its aims and objectives

| | Strongly agree | Agree | Disagree | Strongly disagree | Comments |
|---|--------------------------|--------------------------|--------------------------|--------------------------|----------|
| 1. The partnership's performance management processes include clear milestones, outcomes, indicators and delivery dates | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. There is adequate, timely and accurate management of performance information issued to the partnership | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. Partners deliver what they sign up to do on time | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. Responsibility for the production of performance information is clearly allocated within the partnership | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 5. The partnership review annual performance against objectives? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 6. There are clear lines of accountability for the performance of the partnership as a whole | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 7. The financial position is monitored and reported quarterly to the partnership | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 8. The partnership has a risk register and manages the risks to the achievement of its objectives | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 9. Partnership successes are well communicated outside of the partnership | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

List the partnership's performance indicators

Please specify

How is overall performance reported to the council and how often i.e. Value for Money, effectiveness and robust governance arrangements?

Please specify

What measures are in place to minimise the effects of risks?

Please specify

Has the partnership measured its impact on the natural environment? How?

Please specify

What processes are in place for evaluating the economic, social and environmental impact of decisions?

Please specify

What arrangements are in place for conflict resolution?

Please specify

7. Summary Assessment

BDC Representatives

No of Councillors: Enter Number Estimated Annual Time commitment Enter Number days

No of Officers: Enter Number Estimated Annual Time commitment Enter Number days

BDC Resource

Money Enter amount (£)

Other (e.g. in kind) Please specify

What role does BDC play? Lead Member Other please specify

How is the partnership contributing to the council's priorities?

Please specify

On balance, the partnership:

| | Yes | Partly | No | If no or partial, please specify necessary action required |
|--|--------------------------|--------------------------|--------------------------|--|
| has clarity of purpose | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Please specify |
| is delivering against its objectives | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Please specify |
| ensures that resources are used productively | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Please specify |
| manages performance effectively | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Please specify |

Should BDC continue to be involved? Yes No

Rationale for conclusion (Please supply)

NB For all existing significant partnerships this assessment must, on an annual basis, be completed and reported to the Council's Overview & Scrutiny (Community Services) Committee.

Corporate Guidelines: A checklist for existing partnerships

Established partnerships should use this tool for self assessment on an annual basis.

| Key Characteristic | Yes | No | Partly | n/a | |
|--|--------------------------|--------------------------|--------------------------|--------------------------|---------------------------------------|
| 1. Objectives | | | | | |
| The partnerships overall objectives are set out in its terms of reference which are agreed, owned and signed by all the partners | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| The expected benefits of the partnership are clearly identified and owned by each partner | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| The boundaries between activities of the partnership and of the individual partners are clear | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| The partnership contributes to corporate priorities along with external priorities shared by all partners | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| The partnership has undertaken an Equality Impact Assessment | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| 2. Membership | | | | | |
| There is an agreed list of partnership members | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| The voting powers of members are clearly set out | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| Roles and responsibilities of the members are clearly identified | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| 3. Timescales | | | | | |
| The timescales for the partnership are clear and in writing | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| The frequency of meetings are clearly established and meeting dates set for the coming year | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| There is a clear plan of action for when the partnership is dissolved after its objectives have been achieved | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| 4. Reporting and Accountability | | | | | |
| There are clearly documented reporting links between the various levels of authority within the partnership | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| There are clear reporting lines from the partnership to the constituent bodies | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| The partnership has a clear communication strategy for reporting to other organisations or the public | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |

| Key Characteristic | Yes | No | Partly | n/a | |
|--|--------------------------|--------------------------|--------------------------|--------------------------|---------------------------------------|
| 5. Performance Management | | | | | |
| Responsibility for the production of performance information is clearly allocated within the partnership | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| There is adequate, timely and accurate management of performance information issued to the partnership | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| The partnership identifies, assesses and manages the risks to the achievement of its objectives. Risks are also recorded and reported. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| A clear working relationship to share information. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| 6. Resources | | | | | |
| The partnership costs are clearly identified, forward planned, controlled and regularly reported upon | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| There is documented input of resources which has been agreed by all partners | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| Procurement is undertaken in line with the council's procurement policies. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| There are financial benefits resulting from the partnership | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| We have confirmed that the partnership is not a contractual relationship which should be formally procured. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| 7. Project Management | | | | | |
| Where the partnership is engaged in significant projects the corporate project management methodology is used | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| 8. Dispute Resolution | | | | | |
| There is a clear protocol on how disputes are resolved and clear exit strategy is written into the agreement. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| The partnership has a clear policy for dealing with complaints | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| 10. Partnership Agreement | | | | | |
| There is a formal partnership agreement signed by all the partners | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| The partnership regularly reviews its partnership agreement | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |
| The agreement covers all the key governance criteria contained within this checklist | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comments, additional info and actions |

NB For all existing significant partnerships this assessment must, on an annual basis, be completed and reported to the Council's Overview & Scrutiny (Community Services) Committee.