

Partnership working minimum standards

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Partnership working

Partnership working is an increasingly important way in which organisations can deliver more efficient and effective services to local communities. The Flowhession Foundation recognises the strength and value of effective partnerships in contributing to the improvement of the well-being of our local communities.

The Flowhession Foundation has adopted a Partnership Protocol to establish governance and management standards to ensure that our Partnerships are well run and deliver benefit to local communities.

The Foundations Partnership Protocol addresses:

- Why the Foundation enters and engages in partnerships;
- How the Foundation defines a partnership and what constitutes a significant partnership;
- How to enter into a partnership;
- Tools for identifying, managing and supporting partnership arrangements, including good governance.

Our Partnership Protocol

Partnership working is an increasingly important way in which organisations can deliver more efficient and effective services to local residents. The Flowhession Foundation is a member of a number of partnerships with organisations across the local area, and in some cases is also the lead partner, responsible for establishing and leading some of these partnerships.

This protocol establishes minimum standards of governance and management to be followed by partnerships in order to satisfy the Foundation that the partnerships are being well run and are delivering benefit to the community. The protocol will outline key requirements in initiating, approving, setting up, operating, reviewing and exiting partnership arrangements.

The protocol can be used to:

- assess the compatibility of partners by asking them to sign up to some common values and behaviours
- form part of a tendering process, asking potential partners if they would be willing to sign up to and provide evidence of the values specified

Managing Partnerships

The protocol can be used to:

- form part of the partnership governance documents used by organisations to set out the minimum governance requirements for their partners. The protocol will help demonstrate the values of good governance through upholding high standards of conduct and behaviour.
- monitor the values and behaviours of partnerships on an ongoing basis
- enable those engaged in partnership working to hold each other to account for the values and behaviours outlined in their agreed protocol
- aid mediation on a disagreement by providing reference to clearly defined commitments by partners
- promote transparency and accountability of partnership decision making. Once a local protocol is finalised and all members of the partnership have signed up to it, the protocol should become a public document. The protocol should be easy to understand and make what are sometimes complex arrangements and accountabilities clear to the general public.

How will you work together?

This is a crucial stage during which you should critically consider the collaboration opportunity in order to minimise risks and increase chances of success. You should ask questions to yourself, your team and perhaps involve other stakeholders in order to know more about the potential partner organisation.

Questions can include:

- Are your ethical values and objectives compatible?
- Have you agreed on what you want to achieve (i.e. are your objectives aligned)?
- Who is doing what (i.e. is it clear what each party is providing and getting back from the collaboration process)?
- What resources will be required and how much will it cost (financial, management time, other)?
- What are the risks involved in terms of confidentiality, intellectual property, goodwill to your brand, conflicts etc.?
- What are the timescales involved?
- How do you withdraw from the agreement? Do you have an exit plan?

Roles and Responsibilities

The charity's responsibilities and obligations.

For example:

- to provide ongoing assistance to the partner in implementing the project within the limitations of resources and funding at its disposal for these purposes
- to advance funds in accordance with the agreed budget (annexed to the agreement) to the partner in a timely manner to a bank account nominated by the partner

- to carry out monitoring visits on dates as set out in the visit and reporting schedule (annexed to the agreement) or where the charity otherwise considers such a visit is reasonably required, and has given the partner reasonable notice in advance of the visit
- to make available to the partner assistance from appropriate and qualified personnel to provide expert technical advice on the project, whose fees will be funded by the partner in accordance with the budget
- to give reasonable consideration and a prompt response to requests from the partner for adjustments to the budget, or the project activities, or phasing of income and expenditure, or project deliverables or timescales under the agreement, or for the use of unspent funds
- to inform the partner in a timely manner of any changes to the financial, procedural or reporting requirements for the project

The partner's obligations

For example:

- to implement the project in accordance with the agreement, using its best endeavours to complete the activities and deliverables listed in the project implementation document (annexed to the agreement), within the budget and to target timescales
 - to co-ordinate and co-operate with the charity, and to make available to the charity information relating to the project, including the submission of financial and narrative reports required by the visit and reporting schedule (annexed to the agreement) or such other material as the charity may reasonably request
 - to comply with the financial reporting requirements (annexed to the agreement), and to request the funds required to implement the project in accordance with the budget (annexed to the agreement)
- to monitor regularly the project's progress, and to adapt activities where necessary and with the charity's prior agreement so as to ensure that the project is fully implemented within the total amount of the budget
 - to manage the project in accordance with the charity's policies (annexed to the agreement)
 - to facilitate visits to the project, in accordance with the visit and reporting schedule (annexed to the agreement)

- to use its best endeavours to ensure that no funds provided under the agreement are used for any purpose other than the project, or for any improper purposes, or purposes unlawful in the UK or the partner's country of operation, including money laundering, supporting terrorist activity, inappropriate private benefit, or for political purposes; nor to assist or be in contact with any person suspected of such activities; and to report any such suspicions to the charity as a matter of urgency
- in the event of the partner sub-contracting any aspect of the project to local partners, the partner must:
 - before selecting a local partner, conduct appropriate due diligence to ensure that the partner has compatible values, and the capacity and expertise to perform the sub-contract
 - put in place a binding written agreement with the local partner containing terms and conditions that reflect those in the agreement
 - regularly monitor and review the local partner's implementation of the project

Project implementation document

Clearly setting out the details of the project:

- specific activities to be undertaken or other milestones
- where it should be delivered
- the nature of the beneficiaries
- the timeframe
- SMART objectives and deliverables (qualitative and quantitative)

Budget

Setting out different heads of expenditure and amounts allocated to each.

For example:

- staff costs (recruitment, salary, pension, other benefits, training)
- travel costs (travel tickets, subsistence, insurance)
- external costs (procurement of project items, legal fees, auditors, consultancy, bank charges, meeting/event costs, grants to other organisations/individuals)

- office costs (rent, telephone, internet, postage, stationery, printing, artwork/design, office equipment, photocopying)

Financial reporting requirements

Setting out minimum financial standards the partner should follow.

For example:

- maintenance of proper records for a specified period
- auditing requirements
- accounting requirements (keeping funds ring-fenced, accounting in such a way as to enable monthly monitoring of expenditure)
- how financial transactions should be conducted/authorised
- budget monitoring and forecasting requirements
- treatment and permitted levels of underspend or overspend
- treatment of exchange rate gains or losses
- how funds are drawn down (tied in with reporting)
- currency and exchange rate to be used for financial reporting

Relevant policies

Where a partner agency does not have its own policies in place, or its policies do not meet the standards to which the charity wishes it to adhere, the charity should explore whether the partner is willing and to adopt the charity's own policies, for the purposes of the partnership work.

Such policies may include:

- child protection
- staff security
- procurement
- staff handbook
- health and safety
- serious incident reporting
- insurance
- Finance