

## Principles of Partnering and Checklist

### What is partnering?

Partnering is a long-term collaborative approach by customers and suppliers. It can involve two or more organisations. The relationship is based on trust and openness, and the main purpose is the success of the relationship rather than individual objectives in isolation.

Note: Partnering should not be confused with Partnership, which is a legal relationship.

### What are the requirements for partnering?

- **Management Commitment** – Commitment from top-level management to ensure focus on success of relationship.
- **Trust** – Mutual respect and trust between the parties.
- **Sharing** – Openness and sharing responsibility for the success/failure of the relationship.
- **Customer Focus** – There must be overall customer focus in the combined objectives.
- **Innovation** – Responsibility for encouraging and supporting innovation.
- **Investment** - Partnering is resource intensive and involves time and patience.

### What are the benefits of partnering?

- Improved service delivery through trust and openness and by working together looking to achieve continuous improvement.
- Streamlining and making the supply-chain effective, including possible shared services, e.g. sharing of supply chains.
- Improving sustainability including local regeneration, environmental and ethical issues.
- Using Small and Medium sized Enterprises (SMEs) where appropriate, to enhance supply chain performance.
- Improved understanding of the other party's objectives, and achievement of combined objectives.
- Encourages innovation in design, service delivery and technology.

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### When is partnering suitable?

Where the requirement or potential contract is of strategic importance to the Council and/or high value and over a long period.

Use the checklist to identify suitable partnering possibilities for:

- An existing relationship.
- Through the tender process, outline your partnering aspirations in your invitation to tender, and ask bidders to demonstrate how they would meet them. Establish your partnering evaluation criteria.

### **Checklist For Partnering Possibilities:**

This is a guideline for assessing the potential for partnering.

1. **Assess your Requirement:** *(for the entire scope of the provision).*
  - What is the strategic importance of the requirement, either now or in the future?
  - Value of requirement (contract value):
  - Length of requirement (contract):
2. **Assess the Customer:** *(Your organisation).*
  - What are the relevant corporate strategies; e.g. service provision to customer? How can these be achieved?
  - Level of openness: Openness to allow suppliers to attend internal meetings. Discussion of future strategies. Allowing shared examination of processes and supply chain.
  - Level of trust in supplier: Trusting the supplier to provide accurate management information.
  - Role in team: Clearly define customer roles.
3. **Assess the Supplier:** *(Your potential partner or partners. If you are engaging in a tender exercise, use this to outline your partnering evaluation criteria).*
  - What are the relevant corporate strategies; e.g. service provision to customer? How can these be achieved?
  - Level of openness: Open book policies. Openness to allow customers to attend internal meetings. Discussion of future

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strategies. Allowing shared examination of processes and supply chain.

- Level of trust in customer:
- Role in team: Clearly define supplier roles.

#### 4. **Assess the Shared Requirements:** *(The shared elements to ensure the success of relationship).*

- Defining of combined strategy/objectives:
- Risk analysis: Shared risk register.
- Level of openness/sharing required:
- Key Performance Indicators required for monitoring relationship: The emphasis on the performance of the relationship rather than individual contractual obligations.
- Define/set up processes for problem solving, disputes, etc.
- Define the exit strategies: