**Intelligence**

**Evaluating Potential Partnerships: A Checklist**

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Give an association a partner and it can move forward in ways that wouldn't be possible on its own. And with the economic environment many associations are still facing, meetings can be particularly ripe opportunities for organizations to work together.

Yet, despite their potential, conference partnerships can be complicated—raising a host of issues to consider when weighing whether or not they make sense.

At the Academy of Management, we've developed a detailed checklist to guide our evaluation of proposed conference partnerships. Although we know that no single proposal is likely to meet all of the criteria, the checklist helps us focus on questions that matter, so that the result is a positive outcome for all concerned. Our checklist can also be modified to pertain to any type of partnership, not just conferences.

**Alignment**

Does this conference proposal further our mission or advance our core values in a meaningful way?

Does it align well with our current strategic priorities and activities?

Does the conference duplicate or compete with our annual meeting?

**Continuity and Innovation**

Could this conference be replicated over time and in different locations, or is it likely to be a one-time event?

Is this conference the type of event that we could commit to sustaining?

Does it add something new to the field?

**Quality and Benefit**

Is this conference likely to promote high-quality scholarship?

Does it encourage innovation, expanded thinking, and impact, broadly defined?

Are there existing measures, or can measures be developed, for determining that the aims of the conference have been achieved?

Are we improving ourselves as an organization, raising our visibility, and contributing to the development of our members by producing this conference?

Will the conference enhance our legitimacy or build our reputation? Does it put either at risk?

Overall, is the broad-based benefit to the organization as a whole spelled out?

Can we conceive of other benefits?

**Implementation**

Do we have the capacity to undertake this conference? If not, what would be required to do so?

What are the risks—including reputation, financial, opportunity costs, and so forth?

Is the implementation plan achievable?

Is there a clear governance structure for the conference?

**Purpose and Motivation**

What is the purpose of any proposed partnership? Why and for whom is this conference important?

What is the quality of the partner's reputation? Is this partner the best choice for the event?

Are the image, activities, and values of the partner consistent with our own?

Does the partner have a core competency that we cannot or do not wish to develop?

Have any potential conflicts of interest been disclosed?

Does the potential exist for unintended negative consequences to result from working with the partner(s)—such as self-dealing, perceived favoritism among or damage to relationships with allied organizations, privileging of select institutions,

misuse/misrepresentation of our name, reputational risk, risk of being "captured" by special interests for hidden gains, and so forth?

Does the relationship provide the opportunity for the partners to realize equal value or benefit? If unequal, is this justified and understood?

Are the roles, relationships, and obligations of the partners clearly defined? What benefits or considerations will the partners provide each other?

Is our role more than funding agent, marketing channel, or in-name sponsor of the event?

Would this event take place irrespective of our involvement?

**Policies, Legal, Financial, and Resources**

Is there anything in the proposal that is inconsistent with existing policy or prior board decisions?

If this event involves the investment of financial resources, are the parameters, responsibilities, and expectations reasonably specified?

Are the direct costs or financial incentives clear?

What is our return on investment (broadly defined to include membership and finances)? Is the return reasonable? What is the investment period?

Are there any risks (financial or legal) that have to be assessed?

Can we (and/or our partners) provide adequate resourcing for the event, including staffing, technology, and support services?

Is there anything about the conference that involves unrelated business income or could jeopardize our tax-exempt status?

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