WHAT WOULD BE ON YOUR PARTNERSHIP EXIT CHECKLIST?

Sadie Lynch, CTArc,
is the Business Operations Manager within ORBIS

Part of our role is a bit like being a wedding planner, bringing together organisations to create the new, better, lower-cost service. But sometimes we may find ourselves dissolving them too.

Whilst every partnership and collaboration starts out with the best intention to last the distance, the time could come when separation is on the cards.

So it's prudent and practical to consider this, even as contracts are being drawn up. What would we need to do to reverse this process cleanly? BREXIT is perhaps a good example of how this is happening now on an international scale.

However, if we focus just within the UK public sector, there may be changes in the political landscape that can take one half of the partnership in a different direction. Or, differing long term strategies and shifting budget pressures can result in one partner having to make the decision to dissolve the partnership and move in a separate direction.

The role of a CTArc as a divorce planner

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Rob Neil (SSA) shared some interesting insight in this magazine about how the closure of a shared service can be a very emotional experience because of the level of investment made in relationships and creating a shared vision.

Whatever the reason for the decision, it is important that relationships remain positive and that the work to dissolve all or part of the partnership is carried out in a collaborative way. As well as protecting reputations, it will make the process quicker, more cost effective and hopefully leave the door open for new collaborations in the future.

Rob's article got me thinking about a *"Shared Service Divorce"* from a project prospective and the practicalities of such an event. Once all the tricky decision-making is out of the way, what is the best way to actually get the work done?

With such effort going into a partnership as it is developing, it would be a shame to not put similar thought and effort into disassembling and picking apart all the work that has been done in a way that causes minimal turmoil.

Creating an exit checklist

Whilst Rob's article looked at the options around approaching what a new operating model would look like, I thought it would also be useful to have a practical tool that could be used by both senior managers to consider key issue points and by project managers to identify the various components of the actual process – an "Exit Checklist".

This is intended as a starting point for identifying priorities and building up a basis of a considered and managed exit plan.

As each partnership and separation will be different, there is no one right way to go about this process. However, much like moving house, there will be common factors that should be considered, plus a high level series of events that will allow for a smooth transition.

My exit checklist, below, is intended to act as a guide for the key areas common to most services: a prompt to consider what action may be needed to be taken on a specific area to ensure costs and risk are minimised through the process and that the best result is achieved at the end for all parties.

It is by no means an exhaustive list and each partnership will of course be unique in many factors. This is intended as a starting point for identifying priorities and building up a basis of a considered and managed exit plan.

The checklist assumes that someone has already been identified as an owner or sponsor for the exit. It's aimed to help them identify the fundamental elements of the exit that need to be considered as in or out of scope; who the owner is and what the next key actions are that are needed to create a more detailed plan.

The outputs of completing the checklist exercise should identify both the next actions to be taken and the right resources to own those actions.

Steps towards the exit

1. **Identify, assign and empower an exit manager** – to manage the over-all exit and ensure they have adequate resources in place to support them.
2. **Identify owners** This could be a designated project manager who will manage the resource allocation against the various streams as they are identified, or it could be a group of different people with responsibility across specific functional elements within the partnership.

   Either way, it is important to identify the correct owners – people who have both the authority to act and time availability to focus on this important phase in the partnership lifecycle.
3. **Agree actions and dates** Based on the elements identified and the owners assigned, agree what the first steps are and what the timeline looks like. This will eventually become the high level project plan.
4. **Monitor** It's very likely that as the plan matures and develops, it will grow more complex and more gaps will be identified and filled in.
5. **Communications** What messages do you need to tell staff, suppliers, customers and the market? How and when will you tell them?
6. **Legal** What post exit liabilities are there and how will these be managed?
7. **Financial** How will shared costs (such as redundancy or early exit from shared contracts) be split; what new budgets will be needed? How will ongoing shared costs be managed?

As with most projects, there will no doubt be a host of plans, reports and logs, that will accompany what could be a significant programme of works.

This initial list can be used to monitor those important things that were identified early on to make sure the focus remains right and the big stuff is getting handled.

Maybe you have thoughts, or even experience of dissolving partnerships, that we could add to the list and share across the CTArc and CTPrac community in future magazine articles.

An Example
Partnership Exit Checklist

Element	Owner	Action Required
Identify, assign and empower an exit manager - to manage the overall exit plan		
Review lessons learnt - and what actions should form part of the exit plan		
Services - Identify all services impacted and what the options are for new arrangements to avoid impact to service delivery		
Stakeholders – Identify individuals and groups impacted by the change; what it going to change; what do you need to tell them and when		
Systems – Identify all shared systems or those with joint interfaces; who the owners are; what the exit impact is on contracts, licences, hosting etc		
Data - Identify shared data repositories and consider how they will be handled; what data migration is needed; what historic data needs to be kept and where/how; what restrictions are there around splitting shared data		
Suppliers - Identify 3rd party suppliers and what impact the Exit will have on them – do contracts need amending; are the early exit clauses or costs that need to be considered?		
Staff - Identify employees impacted; their T&Cs; Consider TUPE implications and associated costs for subsequent restructures; will there be skills gaps post-split?		
Assets - Identify all assets and owners – what are the options, considerations costs. etc		
Property - Identify all shared locations and properties – what are the options, considerations, costs etc		
Communications – What messages do you need to tell staff, suppliers, customers and the market? How and when will you tell them?		
Legal – What post exit liabilities are there and how will these be managed?		
Financial - how will shared costs (such as redundancy or early exit from shared contracts) be split; what new budgets will be needed? How will ongoing shared costs be managed?		