Stage 1


**TOOL 3**

**Checklist for establishing mutual expectations**

a) Who will be the recipient of support? (Individual partners or the whole cluster?)
b) The type of approach to support you will provide (ie taking a facilitative and consultative role rather than an administrative or coordinating role, or a management and/or leadership role)
c) Your accountability (to the whole partnership via the ‘lead’/key nominated contact rather than to individual partners)
d) Confidentiality (What approach to confidentiality can partners expect from you?)
e) What level of support they can expect? (Weekly, monthly, bimonthly?)
f) The extent to which this will be time limited

h) What methods you will use to deliver support (eg direct face-to-face work – one-to-one or whole partnership? Report writing? Desk research? Accessing specialist support for the partnership? Telephone or email support?)
i) Level of commitment required of individual partners to working with you and with the partnership overall
j) Attendance at partnership meetings (ie will partners attend regularly and will attendees have the necessary authority?)
k) Give examples of tasks and the extent of commitment required; emphasise the importance of deadlines

k) Communications with you and the partnership (Who will be responsible for undertaking administrative tasks and communications with you and for the coordinator role? What response rate is required from partners in terms of responses to emails, phone calls etc?)
l) Timekeeping (Importance of avoiding time wasting for you and other partners)
m) Your own evaluation of the support offered (How will it be done? What will this require from partners?)
n) Ending the relationship (Reasons for terminating the support? Exit strategy for ending the support? Suspending/postponing the support programme until a later date).

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**Purpose:**
To establish mutual expectations between individual partners and the collaboration facilitator.

**Outcome:**
You will have established mutual expectations for the delivery of your support.