



## Strategic Partnership Policy

Approved by the Board of Direction 11-18-24

### 1. Purpose

The purpose of this Strategic Partnership Policy is to establish guidelines for the development, management, and evaluation of national partnerships with external organizations. These partnerships are intended to further the mission, vision, and strategic direction of SAME by leveraging shared resources, expertise, and networks.

### 2. Scope

This policy applies to all strategic partnerships entered into by SAME, including but not limited to collaborations with other non-profit organizations, businesses, government agencies, educational institutions, and community groups. Posts and Regions may enter into partnerships at the local level outside of this policy.

### 3. Definition of Strategic Partnership

A strategic partnership is defined as a formal collaboration between SAME and one or more external organizations. These partnerships are characterized by shared goals, mutual benefit, and a commitment to achieving a common objective that aligns with the strategic plan of SAME.

### 4. Objectives of Strategic Partnerships

Strategic partnerships should aim to:

- Advance the strategic plan of SAME.
- Increase the impact of programs and services offered by SAME.
- Expand the reach and visibility of SAME.
- Enhance the capacity of SAME to achieve its goals.
- Benefit SAME Members and/or recruit new members.

### 5. Criteria for Partnership Selection

When considering potential partnerships, SAME will evaluate:

- **Strategic Alignment:** The partner organization's mission and values should align with those of SAME.
- **Mutual Benefit:** The partnership should offer clear benefits to both parties.
- **Reputation:** The partner organization should have a positive reputation and a track record of success.

- **Resources and Expertise:** The partner should bring resources, expertise, or networks that complement those of SAME with no money exchanged.
- **Sustainability:** The partnership should have the potential for long-term collaboration.
- **Risk Management:** Any potential risks associated with the partnership should be identified and mitigated.

## 6. Partnership Development Process

The process for developing a strategic partnership will include the following steps:

- **Identification:** Board members will identify potential partners that align with the strategic goals of SAME and notify SAME Strategic & Stakeholder Relations. While there are exceptions, most partnerships should align and reside with a Community of Interest (COI) which is where collaboration will occur.
- **Initial Contact:** Engage in preliminary discussions to explore mutual interests and potential collaboration opportunities with appropriate stakeholders/COI, staff, and SAME Strategic & Stakeholder Relations. A “stakeholder champion” must be identified to cultivate the relationship, report status updates, and recommend changes.
- **Due Diligence:** SAME and the stakeholder champion will conduct due diligence to assess the partner's reputation, financial stability, and alignment with the COI and SAME's strategic goals.
- **Proposal Development:** Work collaboratively to develop a partnership proposal (Memorandum of Agreement or Understanding, MOA/MOU) outlining the goals, roles, responsibilities, and potential resource exchanges of each party. Strategic Partner information will be stored in the SAME member database.
- **Approval:** Obtain approval from the National Leadership Team before formalizing the partnership. It will be added to the Consent Agenda for the next Society Board Meeting before being executed.
- **Agreement:** Formalize the partnership through a written agreement that details the terms and conditions of the collaboration.

## 7. Roles and Responsibilities

- **Executive Director:** Responsible for the overall management and oversight of strategic partnerships.
- **National Leadership Team:** Provides approval for high-impact or long-term partnerships. Engage peer-leaders as appropriate for strategically impactful partners.
- **COI Chairs & Stakeholder Champions:** Oversee the implementation and evaluation of partnership activities within their respective areas.
- **Strategic & Stakeholder Relations:** A designated staff member who serves as the primary point of contact for the partner organization.

## 8. Partnership Evaluation and Review

All strategic partnerships will be regularly evaluated against the MOA/MOU to ensure they continue to meet the objectives and criteria outlined in this policy. The evaluation process will include:

- **Performance Metrics:** Assessing the outcomes and impact of the partnership.
- **Regular Communication:** Maintaining ongoing communication with the partner to address any issues or opportunities.
- **Annual Review:** Conducting an annual review of the partnership to determine its effectiveness and the potential for renewal, modification, or termination.

#### **9. Termination of Partnership**

Either party may terminate the partnership with due notice if the collaboration is no longer mutually beneficial, if objectives are not being met, or if there are concerns about alignment with SAME's strategic goals. The termination process should be conducted in a manner that minimizes disruption to ongoing activities and respects the contributions of both parties.

#### **10. Policy Review**

This Strategic Partnership Policy will be reviewed annually by Strategic & Stakeholder Relations and updated as needed to reflect changes in the organization's goals, strategy, and external environment.

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