

# Collaborative working

How we can help you to make it a success



# Stage 1: Scoping

We will discuss your plans and objectives for the project.



# Why Collaborate?

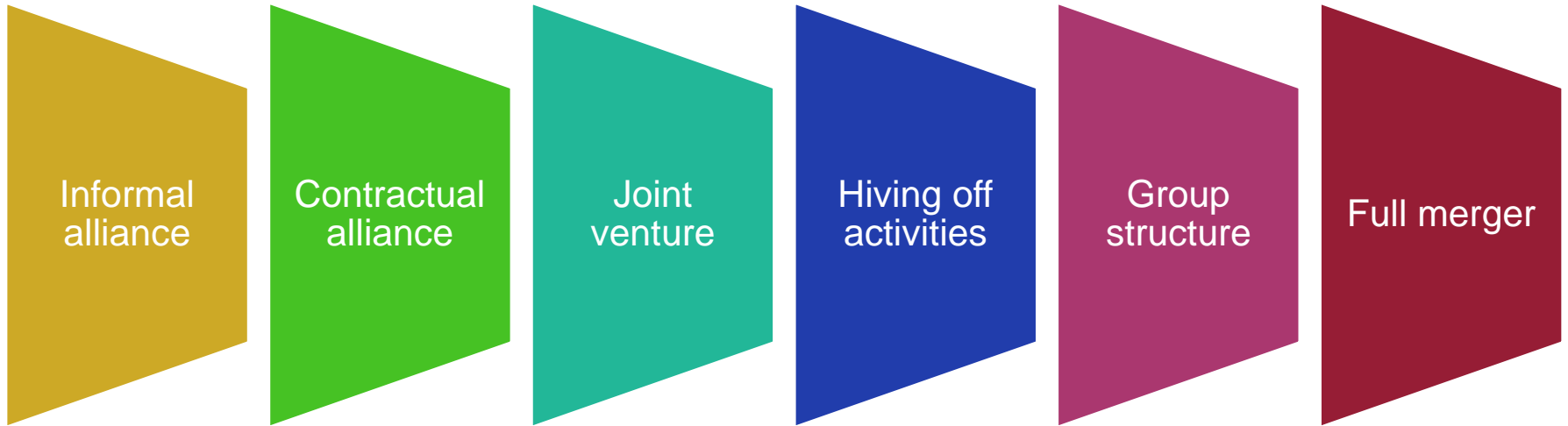


Trustees consider the benefits and risks of partnership working, merger or dissolution if other organisations are fulfilling similar charitable purposes more effectively and/or if the charity's viability is uncertain.



Charity Governance Code

## Stage 2: Explore the options



We will explore the options with you and help you to decide what is best suited to the project given factors such as the purpose, size and complexity, parties involved and tax considerations.

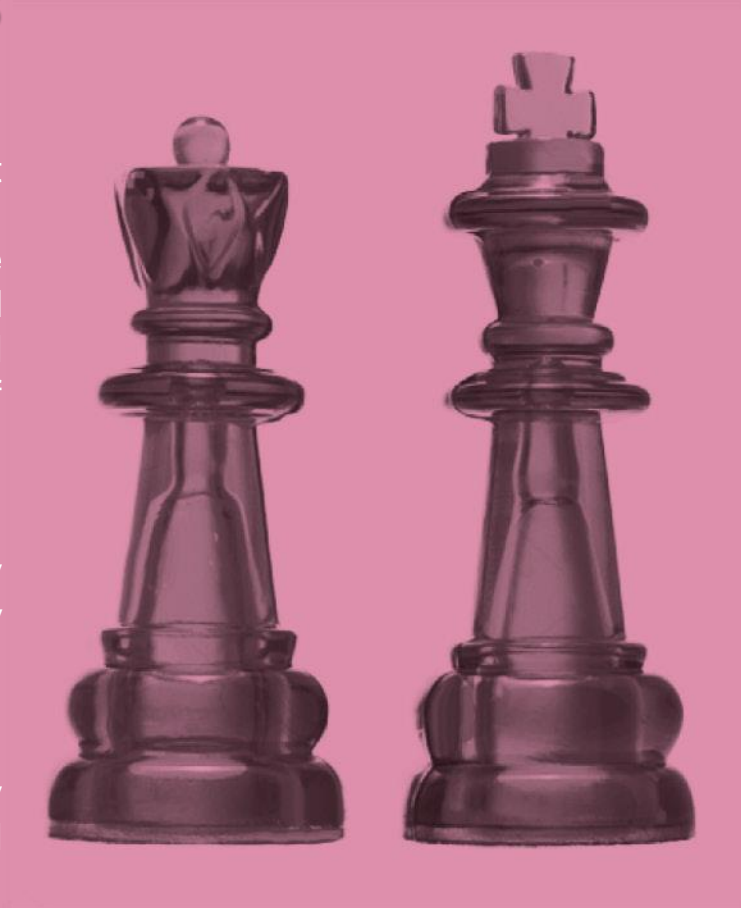
We can provide you with a non disclosure agreement to protect the parties' sensitive and commercial information at the outset.

# Stage 3: Heads of Terms

If you proceed with a contractual alliance or a joint venture then you will likely want Heads of Terms. These can cover a range of provisions such as the project plan, compliance with any funding/ head agreement, joint working mechanisms, intellectual property use, data privacy, contribution of funding/assets, liability and an exit strategy.

Time invested at the outset agreeing the key principles will be rewarded with a smoother journey to negotiating the final documents.

We can provide you with a template of the key provisions to discuss and assist with a meeting of all parties to negotiate and agree the Heads of Terms.



# Stage 4: Due Diligence

Whilst the Heads of Terms are being negotiated you may want to carry out some due diligence on your prospective collaborative partners.

This can explore their financial position and solvency, governance, track record of delivering similar projects and reputation.

We can provide you with a due diligence questionnaire proportionate to the size of the project and risks involved and advise you on responses given by other parties, or your own responses to a due diligence exercise.



# Stage 5:

## Collaboration Agreement

We will provide you with draft documents and any necessary constitutional documents for a joint venture vehicle.

These will be based on the Heads of Terms and flow down any obligations from any head or funding agreements.

We can then assist in negotiating and finalising the documents.



# Stage 6: Ongoing Support

From here your project can begin its journey and we can continue to support you along the way. Whether that be with governance and policies, real estate, employment, immigration, regulatory matters or brand management the Bates Wells team has a full service to help you achieve your positive impact.

To discuss anything further please speak to your usual advisor or contact Bates Wells at [teamcharity@bateswells.co.uk](mailto:teamcharity@bateswells.co.uk) or on 020 7551 7777.

*"They really try to understand your business and think of things from your perspective."*  
**Chambers UK**

