

# The Phoenix Fellowship Partnership Policy

Version: 1.0

## Purpose and scope

The Phoenix Fellowship (TPF) values partnerships that strengthen its mission to support refugee and displaced students in higher education. This policy sets out how partnerships are established, governed, and reviewed to ensure that all collaborations uphold TPF's charitable objectives, independence, and reputation. The policy applies to all formal partnerships, including delivery partners, universities, funders, corporate supporters, and third-party organisations acting on behalf of or in collaboration with TPF. It also covers memoranda of understanding (MOUs), grant administration arrangements, and strategic collaborations.

## Statement

TPF's partnerships are grounded in trust, transparency, and shared purpose. All collaborations must align with the charity's values - integrity, inclusion, accountability, and excellence - and must contribute directly to its objects. Partnerships must never compromise TPF's independence, governance, or compliance with UK charity law.

## Principles

- Partnerships must further TPF's charitable purpose and benefit its fellows or wider mission.
- Each partnership must have a clear rationale, defined responsibilities, and measurable outcomes.
- Decisions to enter, renew, or end a partnership rest with the Board of Trustees.
- All agreements must comply with TPF's Financial Controls, Safeguarding, Privacy, and Data Protection policies.
- Conflicts of interest must be declared and managed in accordance with the Conflicts of Interest Policy.
- TPF will ensure equality, inclusion, and ethical conduct across all collaborations.

## Types of Partnership

- **Delivery Partnerships** – organisations delivering programme elements on behalf of TPF (for example, REUK managing longlisting, payments, or fellow support).
- **Strategic Partnerships** – alliances that advance shared objectives, such as collaborations with universities, funders, or research networks.
- **Corporate or Philanthropic Partnerships** – organisations providing funding, in-kind support, or sponsorship.
- **Academic and Mentorship Partnerships** – collaborations supporting fellows' academic or professional development.

## Governance and Approval

- The Board of Trustees must approve any new partnership before it is formalised.
- The Chair and Treasurer may authorise negotiations in principle, subject to later Board ratification.

- Each partnership must be documented through a written agreement, such as an MOU or contract, specifying:
  - Purpose and scope
  - Roles and responsibilities
  - Deliverables and timelines
  - Financial arrangements (if any)
  - Safeguarding, confidentiality, and data protection provisions
  - Dispute resolution and termination clauses

## Due Diligence

Before entering any partnership, TPF will assess the prospective partner(s)'s:

- Legal status and governance structure
- Financial stability and funding sources
- Alignment with TPF's mission and values
- Safeguarding, data protection, and equality practices
- Reputational and ethical track record

Findings will be recorded and reviewed by the Board prior to agreement.

## Management and Monitoring

- Each partnership will have a named lead Trustee or Policy Lead responsible for oversight.
- Partners must provide regular updates, including progress reports, outcomes, and financial or risk information as relevant.
- For key delivery partners (such as REUK), quarterly performance reports will be submitted to the Board.
- Material risks or breaches will be escalated to the Chair immediately.
- All partnership documents and reports will be retained in accordance with the Records Retention Policy.

## Financial Arrangements

Where a partnership involves the transfer or management of funds, the following apply:

- Financial arrangements must comply with TPF's Financial Controls Policy.
- Payments must be supported by invoices or agreed schedules, with clear evidence of delivery.
- Partners must maintain accurate financial records open to review by TPF or its auditors.
- TPF reserves the right to withhold or recover funds if terms are not met or misuse is suspected.

## Communications and Branding

Partners may use TPF's name and logo only with prior written permission and in accordance with TPF's communications guidelines. Any joint communications or public announcements must be approved by the Policy Lead to ensure accuracy and consistency.

## Review and Termination

- Each partnership will be reviewed at least annually to assess performance, alignment, and value for money.
- Either party may terminate a partnership by written notice where objectives are not being met, terms are breached, or risks become unacceptable.
- Termination procedures will ensure continuity for fellows and safeguarding of charitable assets.

## Conflict Resolution

Where disagreements arise, both parties will seek resolution through constructive dialogue. If unresolved, the matter will be referred to the Chair of Trustees or an independent mediator where appropriate.

## Contact

If you have any questions about this policy, please contact the Policy Lead using the [policy@phoenixfellow.org](mailto:policy@phoenixfellow.org) email address.

## Review

This policy is reviewed at least once a year and sooner if legal requirements or our operations change. The version number and effective date will be updated on publication.

## Effective date

Effective from. 1<sup>st</sup> October 2025

Document owner. Policy Lead.

Next planned review. September 2026