Protocol for Partnership Alliance with a Nonprofit Organization

PMIEF may opt to enter into a formal partnership alliance with a nonprofit organization in efforts to engage key decision makers and influencers who can support and promulgate its mission as well as raise awareness for its unique contribution to society.

Operating Principles

To maintain its reputational standing and integrity among populations both internal and external to the PMI global community, PMIEF ensures that any partnership alliance into which it enters is:

- unquestionably ethical;
- aligns with and advances its mission to leverage project management for social good; and
- does not create a real or perceived conflict of interest.

PMIEF abides by a four-pronged protocol when deciding if it should enter into a formal partnership alliance with organizations and clearly communicates this approach to ensure transparency during – and an understanding of – its decision-making process. This protocol:

- considers competing interests between PMIEF and a potential nonprofit partner to assist in minimizing potential conflicts that could arise in the immediate and long-term;
- ensures transparency and fairness as the foundation reviews the partnership request;
- considers potential risks involved in the alliance and ensures that a formal agreement is entered into that eliminates or minimizes the impact of those risks; and
- requires PMIEF to enter into a formal partnership alliance where appropriate.

Four-Pronged Protocol

1. Determine value and perception.

When determining if it should enter into a formal partnership alliance with a nonprofit organization, PMIEF carefully considers if and how the relationship will prove mutually beneficial. The foundation also contemplates how the foundation's (current and potential) partners and stakeholders will perceive the relationship. To do so, PMIEF assesses the organization's mission, leadership, operating practices, record of accomplishment, type and quality of services delivered, and other partners. This vetting allows the foundation to contemplate both the potentially positive and negative impacts of the partnership before entering it.

2. Ensure shared understanding of goals.

The foundation examines the rationale for the partnership alliance, particularly what each entity hopes to gain from it so that there is clarity of purpose from the outset. Should PMIEF enter into a formal partnership alliance with a nonprofit, then the written alliance agreement must specify these expectations. It must also include if/how the nonprofit will publicly promote the alliance to ensure that PMIEF is represented only in a manner consistent with its mission. In addition, the agreement must specify the term, i.e., time period, of the partnership and conditions for dissolving it.

3. Ensure shared understanding of responsibilities.

PMIEF clarifies what responsibility each partner will assume in the alliance, e.g., the provision of fiscal, human and material resources, and how these will be appropriately monitored. PMIEF identifies potential risks that may be present in the partnership and determines the appropriate mitigation strategy to safeguard against such risks. In addition, the foundation clarifies how the partners will promote the alliance, including through what distribution channels and to what audiences, as well as the role each will assume in monitoring that promotion. The written alliance agreement must specify these conditions so that PMIEF can safeguard and fully protect its reputation while it concurrently ensures accurate messaging about the nature of the partnership.

4. Design efficacy assessment.

The foundation decides how it will continuously assess the efficacy of the partnership alliance. This requires developing key performance indicators against which it can both manage and assess its attainment of partnership goals, determining who will lead this evaluation, and deciding if and when it should enact an exit strategy to conclude the partnership.

28 July 2015