

## CHECKLIST FOR THOSE CONSIDERING PARTNERSHIP

Partnership	
Why these are useful:	These questions will help you to understand who all the partners are; how the relationship between partners is managed; the relationship with the NHS and what the future of the practice and locality looks like in the next five years
Partnership	Is there a partnership deed and do you understand what it includes? If not ensure one is produced
	Meet your future partners and understand what their plans and thoughts are on the future of the practice
	Understand what your share and role within the partnership is going to be
Contract	Does the partnership hold a GMS or PMS contract and do you understand your obligations under it?
	Identify whether there have been any problems or warnings about the performance of the contract in the past 5/10 years?
	Identify any other NHS contracts held and the obligations and benefits under them
Business plan	Has the practice developed a five-year business plan?
	Are there opportunities to amend and inform the future direction of the practice?
	Are you going to be able to help the delivery of this plan or if one does not exist are you going to be empowered to shape the future of the practice?
Federations	Is the practice a member of a federation of other form of collaborative working group?
	If it is and even if it is not, ascertain what is happening locally with wider general practice and establish what the impact of this is likely to be on the practice
Governance	
Why these are useful:	These questions will help to identify any risks the practice is facing and should be used to give assurance that the practice has sufficient processes and procedures to manage this and future risks
CQC	Obtain copies of CQC reports and understand whether any actions were taken to improve in areas identified
Clinical Governance	Obtain confirmation that appropriate medical practice cover has been maintained by your partners and understand the process for obtaining cover.
	Have any concerns been raised by regulatory bodies about the practice's services?
	How are the higher risk patients identified and managed within the practice?
Information Governance	Understand IG policies and whether any issues have been raised
Health & Safety	Ensure that there are no outstanding concerns that need resolving
	Obtain details of any ongoing, known or suspected claims relating to health and safety issues
Complaints and claims	Understand whether there are specific issues arising from complaints against the practice and what steps are being taken to rectify these
Insurance	Obtain assurance that the practice has appropriate insurance cover

## Financial and Operations

**Why these are useful:** It is essential to understand the finances of the practice to ensure you know what the priorities are and where any threats exist to future drawings

**Budget & Accounts** Has the practice got a budget, is it regularly reviewed and how is the practice performing against it?

Ensure you understand the past accounts and obtain 'the story' around any anomalies

Speak with the partnership's accountants

**Revenue** Understand each revenue stream and what factors influence the amount received

Does the practice provide non-NHS / private income streams?

**Expenses** Understand what the main expenses are and where the risks are for unanticipated increases in costs

Are there any loans or other long term obligations you need to be aware of?

**Equipment** Understand what items are owned by the partnership and what you will be expected to contribute

## Property

**Why these are useful:** The property is one of the most important aspects of any practice and understanding the commitments and requirements is essential. Is the site sustainable and suitable and if not you need to be assured that there is a plan to resolve this and to give you long term stability

**Leases** Understand what the current arrangements are with the property

Are you expected to purchase a share in property, if so who are the other owners and how will funding be arranged?

If it is a lease what are the obligations and how long is left?

Are there any payments due such as disputed service charges?

Is the property fit for purpose or does it require work which you may have to contribute to?

Is there a plan for the future of the property both with the practice and in the wider primary care strategy for the locality?

## Human Resources

**Why these are useful:** The team in any practice defines its success, stability, reputation, atmosphere and culture. It is normally the biggest expenditure and slight variances will cause big changes to partners' drawings. They also represent a significant legal obligation for each partner and you need to be confident that you understand your role as their employer

**Structure** Who is the wider team and how is the practice managed?

**Performance Management** What is the practice's performance management system e.g. frequency of appraisals and what is the role of the partners within this?

Are there known problems or risks including any potential claims for compensation of any kind?

**Clinical staff** How are records maintained especially relating to professional body membership and DBS checks

What training is available and how is it monitored?