NAFA Partnering Policy Statement

This policy applies to any partnership opportunity for NAFA or any of its chapters, committees, or other entities subject to NAFA’s control.

Only the NAFA Board of Directors has the authority to commit NAFA or any of its chapters, committees, or other entities subject to NAFA’s control to any form of partnership agreement or arrangement. If there is any doubt as to whether a particular agreement or arrangement is subject to this Policy, such doubt shall be resolved in favor of the Policy’s applicability.

Throughout this document, the term “NAFA” is intended to mean NAFA “national” and all NAFA chapters, committees, and other entities subject to NAFA’s control. The term “partnership opportunity” is intended to mean any opportunity for formal or informal collaborative activity between a third party and NAFA, including without limitation collaborative grant opportunities and endorsement opportunities.

This policy is not intended to apply to chapters seeking financial or other support of a chapter meeting or event from another entity.

Absent formal approval by the Board of Directors and NAFA legal counsel in a specific instance, NAFA, as well as any of NAFA’s chapters, committees, or other entities subject to NAFA’s control, shall not enter into any arrangement or agreement pursuant to which it becomes a legal “partner” or creates a legal partnership entity with any third party.

If NAFA is presented with a partnership opportunity, the opportunity must be examined in the context of NAFA’s strategic plan and the needs the Board of Directors has identified and prioritized. Of course, some opportunities are truly “once-in-a-lifetime” and may need to be considered regardless of whether or not the need has been identified by NAFA.

A NAFA Officer or Director with knowledge of the subject matter being considered in the partnership, and the appropriate NAFA Staff member, as determined by the Chief Executive Officer, must be involved in communication between NAFA and the potential partner. In some cases, it may be beneficial to have a national committee chair, or other expert, involved in the process. In all cases, the NAFA Chief Executive Officer must be made aware of the partnership being considered at its very early stages.

It must be made clear to the potential partner that only the NAFA Board of Directors has the authority to commit NAFA to any type of partnership agreement or arrangement.

Research must be conducted to discover potential partners that may be able to provide the resource or service being offered by the potential partner. This will ensure that NAFA does not create even the appearance of favoring one organization over another without justifiable reasons for doing so.

The NAFA volunteer leader and Staff member must learn all they can about the potential partner and be able to articulate why this partnership and this partner in particular would be beneficial to NAFA.

None of NAFA’s intellectual property, confidential information, or proprietary materials may be shared with a potential partner without first having an approved Non-Disclosure Agreement in place.
The NAFA Officer or Director and the Staff member proposing a partnership opportunity must inform the Chief Executive Officer and Board of Directors of their activities and progress and obtain approval from the Board of Directors to move ahead with any partnership.

Only upon approval and direction from the Board of Directors may work begin on structuring an agreement with a potential partner; NAFA’s legal counsel must be involved in structuring this agreement. Only the NAFA President or Chief Executive Officer is authorized to sign a partnership agreement on behalf of NAFA.

After entering into an approved partnership agreement, the implementation and maintenance of the partnership relationship will likely be a staff function. Staff will monitor progress, assess results, and communicate all issues with the assigned NAFA Officer or Director. Staff and the assigned Officer or Director will prepare and deliver status reports as necessary for each meeting of the Board of Directors.