



Partnering agreement template

USE

A template including the essential defining elements of the partnership to be agreed by partners

PARTNERING PHASE

End of scoping and building phase

There will be different forms of agreement related to a partnership:

- **Partnering agreement** – non-legally binding, agreement of intent to capture the value, vision and spirit of a collaboration and enshrine the principles of partnership
- **Contracts** – legally-binding agreements, sometimes bi-lateral and usually including financial flows and accountabilities required by funding rules (may be similar to service contracts)

- **Workplan** - constantly iterating project plan with activities, timelines, clear, measurable outputs / outcomes and performance indicators

Partnering agreements will likely be iterative documents, adding and adapting as more information is known and understanding is built up.

Who?

- Short description of partners (including legal status, overall mission), identification of representatives of each partner organisation

Why?

- Vision statement
- Overarching drivers / reasons for involvement of each of the partners
- Objectives of the partnership
- Demonstrable VALUE created through partnering
- How each partner hopes to gain from the partnership

What?

- Mission statement
- Context and target of the partnership activities
- Initial high-level theory of change and expected activities
- What each partner brings to the table / resource commitments
- Roles and responsibilities of each of the partners
- External resources
- Overall measures of success

How?

- Governance / accountability structure including decision-making principles
- Operational structure (coordination / management arrangements / secretariat) and internal communications
- Financial arrangements [details may be in a separate contract]
- Measures to strengthen partner capacity to implement commitments where necessary
- Timeframe and procedure for ongoing partnership review and revision
- Metrics for tracking and measuring partnership performance against partnership and each individual partners' objectives
- Sustainability strategy for sustaining partnership 'outcomes'

What if?

- Risks / threats and mitigation
- Grievance mechanism to resolve differences
- Rules for individual partners to leave or join
- Exit ('moving on') strategy for partnership as a whole

External communications and IP

- Rules for branding (using own, each other's) and other rules for the public profile of the partnership;
- Intellectual property and confidentiality rules
- Protocols for communicating externally

Charter

- Agreed underlying principles / values of the partnership and partners
- Code of conduct / expected behaviours in the partnership