1.10 SCOPING AND BUILDING

Partnering agreement template and scorecard

USE IT
To set out the essential elements of a partnering agreement, and to check a draft against them

WHEN
End of scoping and building; again at review and revision

WHO
Partners together

The ideal partnering agreement captures a collaboration co-created by the partners, not imposed by one of them. Rather than simply a means of control, it should express the vision, aspirations and hoped-for results of the partnership, both collectively and from each partner's point of view. By embedding the core principles of equity, mutual benefit and transparency, the process of agreeing it can itself push a transactional relationship towards a real partnership.

A partnership usually involves several forms of agreement:

Partnering agreement
Not legally binding: a statement of intent that captures the value, vision and spirit of the collaboration and enshrines the principles of partnership.

Contracts
Legally binding, sometimes bilateral, usually covering financial flows and the accountabilities funding rules require.

Workplan
A constantly evolving plan with activities, timelines, measurable outputs and outcomes, and performance indicators.

Partnering agreements are iterative documents, added to and adapted as more is known and understanding grows. Use the template early to guide drafting, and the scorecard later to review a draft.

Part 1: What a good agreement covers

Who?
- A short description of each partner, including legal status and mission
- Each partner's representatives

Why?
- Vision statement
- Each partner's reasons for being involved
- Objectives of the partnership
- The value created through partnering
- How each partner hopes to gain

What?

- Mission statement
- Context and target of activities
- Initial high-level theory of change and expected activities
- What each partner brings, and resource commitments
- Roles and responsibilities
- External resources
- Overall measures of success

How?

- Governance and accountability, including decision-making principles
- Operational structure (coordination, secretariat) and internal communication
- Financial arrangements (details may be in a separate contract)
- Measures to strengthen partners' capacity where needed
- Timeframe and procedure for review and revision
- Metrics for tracking performance against shared and individual objectives
- A strategy for sustaining outcomes

What if?

- Risks and mitigation
- A grievance mechanism to resolve differences
- Rules for partners to leave or join
- An exit ("moving on") strategy for the partnership as a whole

External communication and IP

- Rules on branding and the partnership's public profile
- Intellectual property and confidentiality
- Protocols for communicating externally

Charter

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

Part 2: Agreement scorecard

Score a draft agreement on each ingredient. Where something is missing or only partly in place, note what could be adapted to make the agreement more appropriate to a partnership.

NR Not relevant · × Not in place · ~ Partially in place · ✓ Fully in place

Who?

	NR	×	~	✓
Description of partner organisations, including mission	☐	☐	☐	☐
Representatives and their status	☐	☐	☐	☐

Why?

	NR	×	~	✓
Vision statement	☐	☐	☐	☐
Shared objectives	☐	☐	☐	☐
Individual partner objectives	☐	☐	☐	☐
Underlying values and principles	☐	☐	☐	☐

What?

	NR	×	~	✓
Proposed project or activities	☐	☐	☐	☐

What?

	NR	×	~	✓
Outline workplan	☐	☐	☐	☐
Resource commitments from each partner	☐	☐	☐	☐
Roles and responsibilities	☐	☐	☐	☐
Performance indicators	☐	☐	☐	☐
Sustainability strategy	☐	☐	☐	☐
Risks, collective and to each partner	☐	☐	☐	☐

When?

	NR	×	~	✓
Timeframes	☐	☐	☐	☐
Milestones	☐	☐	☐	☐

How?

	NR	×	~	✓
Relationship management protocols	☐	☐	☐	☐
Governance arrangements	☐	☐	☐	☐
Decision-making procedures	☐	☐	☐	☐
Funding arrangements (possibly in separate contracts)	☐	☐	☐	☐
Measures to mitigate risks	☐	☐	☐	☐
Measures to strengthen partnering capacity	☐	☐	☐	☐
Metrics for measuring performance against each partner's and shared objectives	☐	☐	☐	☐
Health check and review procedures	☐	☐	☐	☐

Communication

	NR	×	~	✓
Procedures for ongoing partner communication	☐	☐	☐	☐
Rules for branding	☐	☐	☐	☐
Rules for the partnership's public profile	☐	☐	☐	☐
Intellectual property and confidentiality rules	☐	☐	☐	☐
Protocols for communicating with constituents and others	☐	☐	☐	☐

What if?

	NR	×	~	✓
Grievance mechanism to resolve differences	☐	☐	☐	☐
Rules for partners to leave or join	☐	☐	☐	☐
Exit strategy for the partnership as a whole, ensuring outcomes are sustained	☐	☐	☐	☐

Adapted from The SDG Partnership Guidebook (Tool 2, p.81); Zambia Partnering Toolbook (Tool 7). © The Partnering Initiative.
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