

Tool 38: Partnership Agreement

Aim of the tool

Manage expectations, avoid misunderstandings, and clarify commitments in order to encourage collaboration between participants of a MSP.

When to use it?

In the Co-creation stage, when ideas for joint activities are defined and take shape.

What is a Partnership Agreement?

As the MSP moves from the Initiating to the Adaptive Planning Phase (see Process model; Section 3 of the MSP Guide), stakeholders will be committing increased resources, which calls for clear agreements among the stakeholders. There are many ways of doing this, from very informal (e.g., an ad hoc collection of individuals) to very formal arrangements (e.g., a new legally registered organisation with independent governance and accountability procedures). The format of a Partnering Agreement described here was developed by Ros Tennyson of the Partnership Brokering Association (PBA) and we consider it useful to clarify agreements between stakeholders.

Partnering Agreements need to be developed at an early stage of a collaboration to avoid misunderstanding. This is not a contract, as it is not legally binding. Rather this is an agreement developed between stakeholders as equals. It outlines their agreement to cooperate, and states explicitly the interests of each stakeholder. Legally binding contracts may be made later if MSPs enter into complex implementation arrangements or handle large amounts of funding.

How to draft a Partnership Agreement

The process of drafting a Partnering Agreement is, in itself, a powerful instrument to bring assumptions that stakeholders have to the forefront. Often parties are a bit unspecific in their intentions for collaborating in the initiation phase, but when the partnership matures it is necessary that things more get specific and clear.

Partnering Agreements can also be reviewed by stakeholders if there is a significant change in their situation: the departure or arrival of a new collaborator, or a substantial shift in the context. Such a regular review process can, by itself, be a good way to monitor the health and relevance of the partnership.

The annex shows a sample Partnering Agreement, which can be adapted and expanded for different contexts and purposes. Remember that it should be jointly developed by stakeholders who are being expected to sign it, to avoid one party feeling pressured to sign without full understanding or ownership.

Learn more

This tool has been adapted from:
Ros Tennyson (2011, 4th edition) *The Partnering Toolbook*.
<https://archive.thepartneringinitiative.org/the-partnering-toolbook/>

TPI Partnering Agreement template: <https://thepartneringinitiative.org/wp-content/uploads/2022/08/02-Partnering-agreement-template.pdf>

Also check out: Stella Pfisterer & Nasim Payandeh (2014) *Designing Comprehensive Partnering Agreements: An Introduction to the Partnering Agreement Scorecard. A tool for co-creating and reviewing partnering agreements*.
https://repub.eur.nl/pub/77616/REPUB_77616_new.pdf

Annex

SAMPLE PARTNERING AGREEMENT

(Courtesy of the Partnering Toolkit)

1.0 PARTNER ORGANISATIONS

1.1 Partner A

Contact details

Contact person

1.2 Partner B

Contact details

Contact person

1.3 Partner C

Contact details

Contact person

2.0 STATEMENT OF INTENT

2.1 We, the undersigned, acknowledge a common commitment to / concern About...

2.2 By working together as partners, we see the added value each of us can bring to fulfil this commitment / address this concern

2.3 Specifically we expect each partner to contribute to the project in the following way(s):

Partner A...

Partner B...

Partner C...

All partners...

3.0 STRUCTURES AND PROCEDURES

3.1 Partner roles and responsibilities...

3.2 Co-ordination and administration...

3.3 Working groups / committee(s)/ advisory group(s)...

3.4 Decision-making processes...

3.5 Accountability arrangements...

4.0 RESOURCES

4.1 We will provide the following resources to

- a) the partnership and
- b) the project...

5.0 AUDITS / REVIEWS / REVISIONS

5.1 We agree to make available all information relevant to this partnership to partners as necessary

5.2 We agree to review the partnership every ... months

5.3 An independent audit of the financial arrangements of the partnership (and any projects resulting from the partnership) will be undertaken on an annual basis

5.4 We agree to make adjustments to the partnership (including re-writing this agreement) should either a review or an audit indicate that this is necessary for the partnership to achieve its objectives

6.0 CAVEATS

6.1 This agreement does not permit the use of copyright materials (including logos) or the dissemination of confidential information to any third party without the written permission of the partner(s) concerned

6.2 This agreement does not bind partner organisations or their staff / officers to any financial or other liability without further formal documentation

SIGNED

on behalf of Partner A

on behalf of Partner B

on behalf of Partner C

DATE

PLACE