

## Developing a Partnership Agreement - The Partnership Agreement Development Tool (PAD)

This worksheet can be used by organizations to assist in developing a comprehensive partnership agreement that clearly addresses each partner's roles and responsibilities and many of the elements needed for the partnership to run smoothly. While agreements can and should be reviewed and revised over time, a strong agreement forged early in the partnership lays the foundation for a strong and sustainable collaboration. Outlined below is a list that partners might include in a written agreement, although not every item needs to be addressed. Agreements vary, reflecting the uniqueness of the partnership.

*Recommended data collection, analyses and interpretation:* The Partnership Agreement Development Tool (PAD) is a qualitative instrument that is intended to be used for documentation of the process of developing agreements. For each section and set of items below, you and your partner/potential partner are to document (check and write-down) whether each was ADDRESSED, DISCUSSED or FINALIZED and what was done at each stage of the process (Action Steps). Use of the PAD is to be a progressive step-by-step building process that will allow you and your partners to discuss, negotiate and identify/decide upon the critical components of an agreement. The end product is a systematically developed and well-reviewed mutual agreement.

The **worksheet** which follows consists of the following five sections:

- I. General Information
- II. Partnership Services
- III. Fiscal/ Resources
- IV. Systems
  - a. Planning and Decision-Making
  - b. Communications
  - c. Oversight
  - d. Record-keeping and Documentation
- V. General Administrative Elements

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### The Partnership Agreement Development Tool

	Not Yet Addressed	Under Discussion	Finalized	Action Steps
<b>1. General Information (often introductory)</b>				
General statement of the agreement's purpose				
Partner's affiliation and legal status				
Contractual Period				
Contract amendments, renewal, and termination procedures				
Role of each partner's decision-making bodies in the contractual development and approval process				
Compliance with local, state, and federal regulations and policies				
Conflict of interest statements and prohibited activities				
Signatures of key parties and date of signing				
<b>2. Partnership Services</b>				
Location of services				
Each partner's role in service delivery				
Staff assigned to support the partnership; which entity/partner employs and supervises which staff				
Responsibilities of each partner's staff				
Staff schedules				
Supervision procedures				
Staff qualification requirements				
Professional development responsibilities (in-service, training, college courses)				
Staff selection procedures				
Annual performance appraisal procedures				
Provisions for substitutes				

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	Not Yet Addressed	Under Discussion	Finalized	Action Steps
<b>3. Fiscal/Resources</b>				
Funding and resource commitment of each partner				
Funding/resources accessed and by which partner				
Designated responsibilities for: facilities/space, maintenance, repairs, food service, and supplies and equipment (who will retain ownership of equipment when/if the agreement ends)				
In-kind services				
<b>4. Systems</b>				
<b>A. Planning and Decision-Making</b>				
Role of each entity's decision-making bodies in planning and decision making				
Community assessment process				
Collaborative, inclusive strategies involving partners' staffs and the community				
Items needing prior approval (items a partner reserves the right to approve)				
<b>B. Communications</b>				
Type, frequency of meetings; meeting participants				
Type and frequency of reports				
Information exchange (calendars, personnel policies, position openings, etc.)				
Other agencies, responsibility of each partner				
Use of technology, i.e., shared databases for tracking, e-mail communication, etc.				
Protocols for information sharing				
Communications				
Dispute resolution procedures				

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<b>C. Oversight</b>				
Notification procedures/follow-up on local, state, and federal monitoring/assessment				
Ongoing observation of partnership operations, review of records, written feedback, follow-up				
Annual program self-assessments, other reviews				
Improvement initiatives (partners' obligations when partnership isn't progressing as envisioned)				
<b>D. Record-keeping and Documentation</b>				
Recruitment, enrollment application, and intake				
Storage of records and access				
Procedures for recording/tracking of services, follow-up				
Transfer of information, confidentiality				
<b>5. General Administrative Elements</b>				
Contact person for each organization involved				
Travel policies				
Liability/insurance				