

DEVELOPING A COLLABORATION AGREEMENT

Adapted from a checklist developed by Heather Graham Consulting Services, 2009.

INSTRUCTIONS: Collaborations will vary in the amount of formality required to define what is to be accomplished and how collaborative partners will work together. While the following template identifies a comprehensive list of key considerations, not every collaboration will need to complete all sections.

Start by reviewing the list with collaboration partners and come to consensus about which are relevant and need to be documented. Then work with partners to complete those sections. Part of the value of the exercise is to capture all the key information about the collaboration in one place and ensure that there is a clear and consistent understanding. If an agreement is already in place, use the key ingredients. If an agreement is already in place, use the key ingredients as a checklist to ensure your collaboration has documented all that it should.

If your collaboration does not require a significant amount of formality, then use the sample collaboration agreement template to help develop a draft document. Be sure to still review the list of key ingredients with partners to be sure that you haven't missed any important considerations.

KEY INGREDIENTS:

1. Background and Mandate:

- Specify how the collaboration was initiated; identify who is funding it; the priority needs/issues to be addressed; and the target population(s) to be served.
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2. Parties and Signatures:

- Describe who is involved with each partner's legal name.
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3. Purpose of the Agreement:

- Identify what the agreement proposes to do and to whom it is applicable (e.g. to document arrangements between the lead and partner organizations...all parties will be guided by the terms and conditions...)

4. Values and Guiding Principles:

- Clarify the values and/or principles that will guide the partner's relationships and the way they will work together.
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5. Project Outcomes, Strategies, Actions and Timelines:

- Clearly state the shared outcomes and actions that all partners will endeavour to achieve, and specify the duration of the collaboration, and the anticipated dates for specific outcomes/actions.
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6. Roles and Responsibilities:

- Specify the roles and responsibilities of key people and decision-making bodies, and clarify employment and reporting relationships.
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7. Policies and Procedures:

- Identify the policies and procedures that partner organizations and collaboration staff will adhere to (e.g. hiring, conflict of interest, media).
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8. Communications between partners:

- Identify when partners will meet; who is responsible for initiating meetings, setting agendas and chairing/facilitating; and how partners will communicate between meetings and maintain ongoing communication within their own organizations. Also consider issues of confidentiality.
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9. Risk Management Provisions:

- Clarify how high risk activities will be managed and by whom; detail workplace safety and insurance responsibilities; and confirm legislated or regulatory obligations.
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10. Decision-making Processes:

- Clarify how the partners, including committees, will ideally make decisions.
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11. Resolving Conflicts and Complaints

- Identify a process to resolve conflicts in a productive way

12. Finances and Administration [note: review signing authority and executive limitation policies]

- Specify who is responsible for setting and changing the budget and making spending decisions; outline how the collaboration will address a budget deficit; and identify what will happen with the funding if the collaboration ends early.

13. Addressing Proposed Changes to the Collaboration:

- Identify the process to withdraw from or to terminate the collaboration, enhance/expand the existing collaboration, and add members to the collaboration.

14. Evaluation Plan:

- Indicate who is responsible for initiating and conducting the evaluation, when and how this will take place, who will participate, and how the collaboration will monitor and respond to the results of the evaluation.

15. Involvement of Program Participants and Community Members

- Identify how community members or program participants will be involved in program planning and evaluation.

