

PARTNERING AGREEMENT SCORECARD

Ensuring the essential elements are in place

Use: To rate a partnering agreement to ensure it contains the essential elements

Partnering phase: Development of a partnering agreement

The ideal partnering agreement is designed to capture an agreed collaboration that has been **co-created** (not imposed by one or other partner). Often such an agreement can be split into an over-arching partnering MoU alongside other forms of agreement or contract for the delivery of specific activities or transfer of resources. Ideally the agreement becomes an expression of the vision, aspirations, hoped-for results of the partnership both from each partner's perspective, and collectively, rather than simply a means of control.

By attempting to embed the core partnering principles of **equity**, **mutual benefit** and **transparency** into the agreement, the process itself can help push a **transactional** relationship towards being more of a **partnership**.

Ingredient	Score (0-10) or n/a	Comments (e.g. what could be adapted to make it more appropriate to a partnership?)
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WHO?		
Description of partner organisations (inc. mission)		
Identification of representatives and their status		

WHY?		
Vision statement		
Shared objectives		
Individual partner objectives		

WHAT?		
Proposed project / activities		
Outline work plan		
Resource commitments from each partner		
Roles and responsibilities		
Performance indicators		
Sustainability strategy		
Risks (collective and to each partner)		

WHEN?		
Timeframes		
Milestones		

HOW?		
Relationship management protocols		
Governance arrangements		
Decision-making procedures		
Funding arrangements (possibly covered by further contracts)		
Measures to mitigate risks		
Measures to strengthen partnering capacity		
Metrics for monitoring & measuring partnership performance against each partners' objectives & shared objectives		
Health check / review procedures		

COMMUNICATIONS		
Procedures for on-going partner communications		
Rules for branding (using own, each others)		
Rules for the public profile of the partnership		
Intellectual property and confidentiality rules		
Protocols for communicating with constituents and other interested parties		

WHAT IF?		
Grievance mechanism to resolve differences		
Rules for individual partners to leave or join		
Exit ('moving on') strategy for partnership as a whole (in particular to ensure sustainability of outcomes)		

TOTAL SCORE: ___ out of ___

Further comments: