

Partnership Agreement Template

I Overview

Purpose

The purpose of this framework is to explicitly identify the roles and tasks being undertaken by [partner] and [partner] for [period]. What follows is a clear outline of roles, responsibilities and decision-making powers as it pertains to [project or program] between [dates].

Project Overview

Partner A and project Partner B will co-lead, [project] to [project mandate]. Phase 1, led by Partner A, [activity]. Phase 2, led by Partner B, [activity].

Duration: May 2018- May 2019.

Leadership & Accountability

[Identify key points of contact for the purpose of this partnership].

Partner A

Name

Title

Email

Phone

Partner B

Name

Title

Email

Phone

II Undertakings

Partner A Undertakings

Partner A, as lead organization for the project, shall assume the following roles and responsibilities in each of the project's key phases:

- Example: Partner A shall retain sole responsibility for all financial obligations to funder and any funders it may bring to Partner A-led phases.

- Example: Partner A shall be responsible for disbursing funds to Partner A according to the Disbursement Schedule below.
- Example: Partner A shall retain responsibility for management of the overall project budget and timeline.
- Example: Partner A will develop a set of key metrics for evaluation of all phases of the project.
- Example: Partner A will, when necessary, source additional sponsorship for Phase 1; be it cash or in-kind support.
- Example: In consultation with Partner B, Partner A shall select participants to partake in Phase 2 of the project.

Partner B Undertakings

Partner B, as a partner organization for the project, shall assume the following roles and responsibilities in each of the project's key phases:

- Example: Partner B shall host and maintain a project-specific web page for [project] and be responsible for its regular updating.
- Example: Partner B will retain financial control over Phase 2 of [project], and will retain any surplus revenue, should such circumstances arise, and, conversely, be responsible for any shortfall in revenue for either phase.
- Example: In consultation with Partner A, Partner B shall design the logo and identity for [project] under a separate contract agreement.
- Example: Partner B shall operate and administer the necessary online platform for Phase 2.
- Example: Partner B will take the lead on adapting and/or developing resources to equip participants with a structure and framework for engagement .
- Example: Partner B will be responsible for evaluating Phase 2 and provide raw data and analysis to Partner A according to the dates outlined in Section V below.

Joint Undertakings

Partner A and Partner B, as co-leads for the project, shall assume the following joint roles and responsibilities:

- Example: Partner A and Partner B will jointly be responsible for the project's overall strategic direction.
- Example: Representatives from Partner A and Partner B will meet in-person or via teleconference no less frequently than once every three weeks during the project.
- Example: Partner A and Partner B shall be jointly responsible for the publication and dissemination of project overview documents, progress reports, and other associated project materials. Exact division of costs and tasks shall be subject to agreement of the partners on an item-by-item basis.

- Example: Other undertakings and matters will be handled on a basis of consultation and agreement.

III Timeline

The following timeline reflects the workplan required in order to provide sufficient time for coordination and communication around [project or program]. Insert timelines or deadlines for major activities and deliverables.

IV Disbursement Schedule

As the lead organization for this project, Partner A will disburse funds according to the schedule below. Partner B is requested to submit an invoice along with a one-pager detailing work undertaken and deliverables met to Partner A on the following dates. Partner A will disburse funds within 30 days of receiving the invoice. Partner B will submit invoices to Partner A referencing [project].

The project budget informs the list of instalments for various phases of the project.

Funder Installments	Schedule of Disbursement	Partner B Installments	Schedule of Disbursement
\$37,500	April 2018	\$15,000	May 31, 2018
\$30,000	January 2019	\$10,000	January 31, 2019
\$7,500	July 2019	\$5,000	July 31, 2019

V Reporting Schedule

The following table outlines the reports Partner A will be required to submit to the [funder] for [project]. The equivalent dates are outlined by which Partner B must submit data and Phase 2 and 3 reports to Partner A.

Reports	Funder Deadlines	Partner B Deadlines
Progress/Interim Report	November 30, 2019	November 01, 2019
Final Report	June 30, 2019	June 01, 2019