

## A CHECKLIST FOR DEVELOPING A PARTNERSHIP AGREEMENT/CONTRACT

Early education partners can use this checklist to assist them in developing a comprehensive 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 a foundation for a strong and sustainable collaboration.

A partnership agreement between early education providers contains critical information and clarifying details. Agreements include some standard legal sections, but the language used often sets the tone for a "partnership spirit." On the following pages, QUILT provides a list of specifics that partners might include in a written agreement, although not every item need be addressed. Agreements vary, reflecting the uniqueness of the partnership. Early education providers can use this document as they develop or review their partnership agreements.

The checklist 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. Recordkeeping and Documentation
- V. General Administrative Elements

<b>I. General Information (often introductory)</b>		<b>Not Yet Addressed</b>	<b>Under Discussion</b>	<b>Finalized</b>	<b>Action Steps</b>
	General statement of the agreement's purpose				
	Partners' affiliations 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 (usually at the end of the document)				
<b>II. Partnership Services</b>					
	Number of children served; hours, days, weeks of operation				
	Location of services				
	Each partner's role in service delivery: child education, child/family health, mental health, disabilities, nutrition, family services/parent involvement, home visits/conferences, meetings, record keeping, transportation, supervision, oversight				
	Staff assigned to support the partnership; which entity/partner employs and supervises which staff				
	Responsibilities of each partner's staff				

<b>II. Partnership Services (continued)</b>		<b>Not Yet Addressed</b>	<b>Under Discussion</b>	<b>Finalized</b>	<b>Action Steps</b>
	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				
<b>III. Fiscal/Resources</b>					
	Funding and resource commitment of each partner				
	Funding/resources accessed and by which partner				
	Payment per child/per year by partners and payment procedures				
	Contingencies required by partner(s) for payment (child enrollment, attendance, etc.)				
	Funds targeted and/or designated for specific improvements (renovations, salary enhancements, quality issues)				
	Designated responsibilities for: facilities/space, maintenance, repairs, food service, and supplies/equipment (who will retain ownership of equipment when/if the agreement ends)				
	Non-federal share/in-kind services				

<b>III. Fiscal/Resources (continued)</b>		<b>Not Yet Addressed</b>	<b>Under Discussion</b>	<b>Finalized</b>	<b>Action Steps</b>
	Provisions for collection and non-payment of parent fees				
	Provisions for the loss of revenues (e.g., child care subsidies & parent fees)				
<b>IV. Systems. A. Planning and Decision Making</b>					
	Role of each entity's decision making bodies in planning and decision making				
	Policy Council representation and elections (if Early/Head Start)				
	Community assessment process				
	Collaborative, inclusive strategies involving partners' staffs and parents and the community				
	Items needing prior approval (items a partner reserves the right to approve)				
<b>IV. Systems. B. Communications</b>					
	Type, frequency of meetings; meeting participants				
	Type and frequency of reports				
	Information exchange (training calendars, personnel policies, position openings, newsletters, etc.)				
	Work with other agencies and responsibility of each partner				
	Use of technology, i.e., shared databases for tracking, e-mail, communication, etc.				
	Protocols for information sharing				
	Parent communications				
	Dispute resolution procedures				

<b>IV. Systems. C. Oversight</b>		<b>Not Yet Addressed</b>	<b>Under Discussion</b>	<b>Finalized</b>	<b>Action Steps</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 and other reviews				
	Improvement initiatives (partners' obligations to each other when the partnership is not progressing as envisioned)				
<b>IV. Systems. D. Recordkeeping and Documentation</b>					
	Recruitment, enrollment applications and intake				
	Parent permission procedures				
	Child screening, assessment and outcomes				
	Curriculum planning and individualized child plans				
	Parent contacts, home visits, parent-teacher conferences				
	Disabilities, medical, dental services				
	Storage of records and access				
	Parent partnership plans				
	Procedures for recording/tracking of services and follow-up				
	Transfer of information, confidentiality				

<b>V. General Administrative Elements</b>		<b>Not Yet Addressed</b>	<b>Under Discussion</b>	<b>Finalized</b>	<b>Action Steps</b>
	Designated contact person for each organization involved				
	Travel policies				
	Liability/insurance				
	Use of partners' names (how partners will publicize the services sponsored by the partnership)				
<b>Other</b>					

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