



You might want to work in partnership with other organisations on your project. We encourage you to do this if it will help you to achieve your project outcomes or if you need support in a particular area of work.

You could choose to work in partnership with:

- another voluntary or community group
- a statutory body, such as a local authority, or
- a private business

However, you should make sure that your proposed partner is allowed by its constitution to legally enter into a partnership with you and can do the work you will be expecting them to deliver.

A partner might help by\*:

- providing training
- seconding staff to work on the project
- line managing some of the project workers
- managing referrals to the project
- acting as an expert adviser on specialist areas.

If you decide to work in partnership with another organisation, we need to be sure that you will be the lead organisation with overall control of the project and our grant.

You must have a formal written agreement with your partner organisation, and if you have more than one partner you must have a separate agreement with each of them. This should define the purpose of the partnership and describe how any potential conflicts or misunderstandings should be resolved. The agreement should explain your responsibilities, as the lead organisation, and those of your partner. The

agreement could be called a memorandum of understanding, legal partnership agreement or contract.

As the lead organisation you should lead the process of preparing the agreement, but both partners must agree the final document.

### **What to include in a partnership agreement**

The content and level of detail in your partnership agreement will depend on the size of your project, the type of work your project will do, and how you will work with your partner. For example, if you will work very closely together throughout the whole project you are likely to need more detail than if your partner will just give advice on a single topic. The partnership agreement should benefit your organisation and your project and be understood by everyone involved.

These are areas we suggest you cover in your agreement.

### **Parties to the agreement**

State the names and addresses of those signing up to the agreement. It should be clear that the organisation applying for our grant is the lead organisation in the partnership.

### **Terms and conditions**

If there is any conflict between the terms and conditions of our grant and the terms of the partnership agreement, our terms must take precedence. The terms and conditions of our grant should be attached as a schedule to the agreement.

### **Purpose of the agreement**

This should include a brief description of the project that the agreement relates to. A copy of the grant application, which provides full details of the project, should be attached as another schedule to the agreement.

\*NB: this list is not exhaustive

### **Roles and responsibilities**

You should make clear which tasks and services each partner will be responsible for delivering and when.

### **Communication**

You should make clear how often the project will be discussed by partners and by what methods, for example, face to face meetings, phone or email. Who will handle enquiries (from the public or from the partner) and how quickly should replies be sent? What will be discussed at formal meetings? Include key contact details.

### **Media communication**

You should make it clear who will be responsible for promoting the project through the media and for responding to enquiries.

### **Resolving disputes**

You should have a process for resolving disagreements between partners. Will you involve an independent third party to arbitrate? Remember that a disagreement between you might mean that you may not be able to meet our grant terms and conditions.

### **Record keeping / monitoring and evaluation / progress reports**

What records relating to the project will be kept and who will be responsible for collecting the information? What monitoring will be carried out? Will there be any evaluation and if so who will be responsible? How often will this be reviewed? As the lead organisation will need to complete regular progress reports for us, you need to make sure that relevant information held by a partner organisation can be easily provided when needed.

### **Finances**

It should be made clear that the lead organisation will be responsible for all funds received from the Big Lottery Fund. What payments will be made to your partner for services provided, how often and what will the method of payment be? The lead organisation must keep records of all project expenditure and be able to provide evidence of spending to us if we ask for it. We cannot be responsible for payments to partner organisations: this responsibility lies with the lead organisation.

### **Equal opportunities**

You should include a statement on the partner's commitment to equal opportunities.

### **Child protection**

If the partner will work with children or young people, you should include a statement ensuring that child protection principles will be met.

### **Timescale**

Make it clear how long the agreement will last and how it can be ended early or extended if necessary.

### **Any other project specific issues**

For example, if you are expecting your partner to produce reports or case studies or other work for you, you might need to consider who is to own the copyright.

### **Declaration**

Representatives of both partners should sign the agreement.