



# 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 the 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





# A Checklist for Developing a Partnership Agreement/Contract

				<b>Action Steps</b>
--	--	--	--	---------------------

## I. General Information *(often introductory)*

		Not Yet Addressed	Under Discussion	Finalized	
<input type="checkbox"/>	General statement of the agreement's purpose				
<input type="checkbox"/>	Partners' affiliation and legal status				
<input type="checkbox"/>	Contractual period				
<input type="checkbox"/>	Contract amendments, renewal, and termination procedures				
<input type="checkbox"/>	Role of each partner's decision-making bodies in the contractual development and approval process				
<input type="checkbox"/>	Compliance with local, state, and federal regulations and policies				
<input type="checkbox"/>	Conflict of interest statements and prohibited activities				
<input type="checkbox"/>	Signatures of key parties and date of signing (usually at the end of the document)				

## II. Partnership Services

<input type="checkbox"/>	Number of children served; hours, days, weeks of operation				
<input type="checkbox"/>	Location of services				
<input type="checkbox"/>	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				
<input type="checkbox"/>	Staff assigned to support the partnership; which entity/partner employs and supervises which staff				
<input type="checkbox"/>	Responsibilities of each partner's staff				



# A Checklist for Developing a Partnership Agreement/Contract

Not Yet Addressed			Under Discussion			Finalized			Action Steps		
-------------------	--	--	------------------	--	--	-----------	--	--	--------------	--	--

## II. Partnership Services *(continued)*

<input type="checkbox"/>	Staff schedules										
<input type="checkbox"/>	Supervision procedures										
<input type="checkbox"/>	Staff qualification requirements										
<input type="checkbox"/>	Professional development responsibilities (in-service, training, college courses)										
<input type="checkbox"/>	Staff selection procedures										
<input type="checkbox"/>	Annual performance appraisal procedures										
<input type="checkbox"/>	Provisions for substitutes										

## III. Fiscal/Resources

<input type="checkbox"/>	Funding and resource commitment of each partner										
<input type="checkbox"/>	Funding/resources accessed and by which partner										
<input type="checkbox"/>	Payment per child/per year by partners and payment procedures										
<input type="checkbox"/>	Contingencies (child enrollment, etc.) required by partner for payment										
<input type="checkbox"/>	Funds targeted and/or designated for specific improvements (renovations, salary enhancements, quality issues)										
<input type="checkbox"/>	Designated responsibilities for: facilities/space, maintenance, repairs, food service, and supplies and equipment (who will retain ownership of equipment when/if the agreement ends)										
<input type="checkbox"/>	Non-federal share/in-kind services										



# A Checklist for Developing a Partnership Agreement/Contract

Not Yet Addressed  
Under Discussion  
Finalized

Action Steps

## III. Fiscal/Resources *(continued)*

<input type="checkbox"/>	Provisions for collection and non-payment of parent fees				
<input type="checkbox"/>	Provisions for the loss of child care subsidies and parent fees				

## IV. Systems

### A. Planning and Decision-Making

<input type="checkbox"/>	Role of each entity' s decision-making bodies in planning and decision making				
<input type="checkbox"/>	Policy Council representation and elections				
<input type="checkbox"/>	Community assessment process				
<input type="checkbox"/>	Collaborative, inclusive strategies involving partners' staffs and parents and the community				
<input type="checkbox"/>	Items needing prior approval (items a partner reserves the right to approve)				

### B. Communications

<input type="checkbox"/>	Type, frequency of meetings; meeting participants				
<input type="checkbox"/>	Type and frequency of reports				
<input type="checkbox"/>	Information exchange (training calendars, personnel policies, position openings, etc.)				
<input type="checkbox"/>	Work with other agencies and responsibility of each partner				
<input type="checkbox"/>	Use of technology, i.e., shared databases for tracking, e-mail communication, etc.				
<input type="checkbox"/>	Protocols for information sharing				



# A Checklist for Developing a Partnership Agreement/Contract

Not Yet Addressed  
Under Discussion  
Finalized

Action Steps

## IV. Systems *(continued)*

### B. Communications *(continued)*

<input type="checkbox"/>	Parent communications				
<input type="checkbox"/>	Dispute resolution procedures				

### C. Oversight

<input type="checkbox"/>	Notification procedures/follow-up on local, state, and federal monitoring/assessment				
<input type="checkbox"/>	Ongoing observation of partnership operations, review of records, written feedback, follow-up				
<input type="checkbox"/>	Annual program self assessments and other reviews				
<input type="checkbox"/>	Improvement initiatives (partners' obligations to each other when the partnership is not progressing as envisioned)				

### D. Recordkeeping and Documentation

<input type="checkbox"/>	Recruitment, enrollment applications, and intake				
<input type="checkbox"/>	Parent permission procedures				
<input type="checkbox"/>	Child screening, assessment, outcomes				
<input type="checkbox"/>	Curriculum planning and individualized child plans				
<input type="checkbox"/>	Parent contacts, home visits, parent-teacher conferences				
<input type="checkbox"/>	Disabilities, medical, dental services				
<input type="checkbox"/>	Storage of records and access				



# A Checklist for Developing a Partnership Agreement/Contract

Not Yet Addressed  
Under Discussion  
Finalized

Action Steps

## IV. Systems *(continued)*

### D. Recordkeeping and Documentation *(continued)*

<input type="checkbox"/>	Parent partnership plans				
<input type="checkbox"/>	Procedures for recording/tracking of services and follow-up				
<input type="checkbox"/>	Transfer of information, confidentiality				

## V. General Administrative Elements

<input type="checkbox"/>	Designated contact person for each organization involved				
<input type="checkbox"/>	Travel policies				
<input type="checkbox"/>	Liability/insurance				
<input type="checkbox"/>	Use of partners' names (how partners will publicize the services sponsored by the partnership)				

These materials may be freely reproduced and distributed without permission for educational, non-commercial purposes, but cannot be sold or republished without written permission. These materials were developed as part of the QUILT Project—Community Development Institute, Education Development Center, and the National Child Care Information Center. QUILT is funded by the U.S. Department of Health and Human Services, Administration for Children and Families.

©2002 Education Development Center, Inc.