

# Partnership Agreement Template: Guidelines and Checklist for Partnering



## Abstract

This template is designed for projects that involve art and research. This template was created to assist different groups of people (i.e. artists, academic researchers, social service workers, community organizers, community workers) involved in projects in which art and research intersect. The plan aims to be accessible as a tool for working collaboratively in art and research projects, and where interdisciplinary collaboration creates specific needs for structure, agreements and documentation.

As the types of partnerships that are the subject of this template require both structure and flexibility, this set of guidelines is designed to serve as a framework for thinking about and working through certain aspects of partnering. These guidelines offer questions for thinking through various aspects of the proposed partnership, as well as spaces to record what has been collaboratively decided upon together by those involved in the partnership.

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# Partnership Agreement Template: Guidelines for Partnering

Centre[4] Art and Research

Included in this document are questions to prompt discussion around a variety of topics that are pertinent to art-community-academic partnerships. These topics include the following:

- [Naming Partners](#),
- [Identifying Common Goals](#),
- [Articulating Project Milestones and Intended Outputs](#),
- [Establishing Timelines](#),
- [Defining Roles and Responsibilities](#),
- [Outlining Communication Expectations](#),
- [Discussing Resources](#),
- [Understanding data and art ownership and sharing](#),
- [Articulating expectations for authorship, acknowledgement, and credit](#),
- [Navigating layered and nuanced research relationships](#), and
- [Honouring the partnership process](#).

As you work through and engage in discussion around the many aspects of partnering, you are welcome to document your progress on the [Collaborative Partnership Checklist](#).

While it is likely worthwhile to discuss all of these various aspects of partnership, they do not necessarily need to be discussed or agreed upon in the order described above. These guidelines are meant to be interpreted and used in ways that work for a wide range of different projects, and may be taken up differently depending on who the partners are.

These guidelines for partnership are also intended to be process oriented. As projects progress, things may shift, and this document and agreement may need to be amended. It should be acknowledged, therefore, that the agreement made by the partners can be collaboratively amended based on how the project progresses. You can refer to this agreement as a sort of road map for your work together, taking turns down different roads if the project starts to veer in interesting and new directions.

## Collaborative Partnership Checklist

Complete? (✓)	Aspect of Collaborative Partnering
	<b>Getting Started</b> <ul style="list-style-type: none"> <li>The project has been named and/or given a title</li> </ul>
	<b>Naming Partners</b> <ul style="list-style-type: none"> <li>All partners and their affiliated organizations have been identified</li> <li>Contact information for all partners has been shared and recorded</li> </ul>
	<b>Identifying Common Goals</b> <ul style="list-style-type: none"> <li>All partners have discussed and agreed upon the shared goals that are intended to be achieved by the project</li> </ul>
	<b>Articulating Project Milestones and Intended Outputs</b> <ul style="list-style-type: none"> <li>The project has been broken down and articulated in achievable milestones and anticipated outputs</li> </ul>
	<b>Establishing Timelines</b> <ul style="list-style-type: none"> <li>The partners have discussed and agreed upon realistic timelines for each milestone, as well as for the project as a whole</li> </ul>
	<b>Defining Roles and Responsibilities</b> <ul style="list-style-type: none"> <li>Each partner has a clearly defined role</li> <li>Responsibilities of each partner have been agreed upon and recorded</li> </ul>
	<b>Outlining Communication Expectations</b> <ul style="list-style-type: none"> <li>The partners have discussed which methods of communication work best for them, and these preferences have been recorded</li> </ul>
	<b>Discussing Resources and Fees</b> <ul style="list-style-type: none"> <li>The resources that each partner is able to offer the project have been discussed and articulated in a way that is transparent and clear</li> </ul>
	<b>Understanding Data and Art: Ownership and Sharing</b> <ul style="list-style-type: none"> <li>There is a shared understanding of what is considered “data,” who has ownership of the art, and how the data and art is to be shared</li> </ul>
	<b>Articulating Expectations for Authorship, Acknowledgement, and Credit</b> <ul style="list-style-type: none"> <li>Considerations are made for ensuring that all partners are appropriately credited for their contributions to the project</li> </ul>
	<b>Navigating Nuanced and Layered Research Relationships</b> <ul style="list-style-type: none"> <li>All partners have engaged in conversations about the many ways that the project may unfold and how they might address them together</li> </ul>
	<b>Honouring the Partnership Process</b> <ul style="list-style-type: none"> <li>The partners come to a shared understanding of the partnership process, including a plan for regular and ongoing communication.</li> </ul>

## Getting Started

What is the name of the project that you are partnering on together?

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## Naming Partners

It is helpful to name who is involved in the partnership, while also being mindful that some of the most sustainable partnerships exist between organizations and not individual people. In the space below, we encourage you to consider and articulate who might be involved in your project moving forward, as well as whether or not they are affiliated with an organization, institution, or community.

Name and Organizational Role/Title	Organizational and/or Community Affiliation	Contact Information

## Identifying Common Goals

You have chosen to partner together because you have a shared understanding of the mutually beneficial ways that partnering can be valuable to this community project. As you work together, it is important to determine and define what your overarching and shared goal(s) might be. This is helpful for ensuring that all partners are working towards a clear and common objective. In the space below, we encourage you to think through, discuss, and record what your common goals and intended outputs might be.

What do you hope to explore or achieve through this project? This might be framed within the terms of a research question or statement.

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## Articulating Project Milestones, Intended Outputs, and Timelines

In addition to establishing common goals for your partnership, it is also helpful to think about the various milestones that you may need to reach to move your project along. This might be, for example, establishing a community advisory board or meeting with an artist for an in-depth consultation about your intended arts research project. Milestones may also include the outputs that you hope to create during and at the end of your project. Outputs may be interpreted as a range of project deliverables, and for example might be thought of in terms of actualized pieces of artwork or reports to funders about the progress and completion of the project.

As you identify the various project milestones and intended outputs that you hope to achieve through your partnership project, it may be helpful to establish timelines for each task. This section can serve as a facilitation tool for talking through the anticipated time that it may take to achieve each project milestone or output identified.

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## Defining Roles and Responsibilities

As you think about the goals of your partnership project, the milestones and outputs that you hope to reach, as well as the timelines established to facilitate the progress of the project, it is also valuable to think about the roles and responsibilities of each partner in ensuring that all of this work happens.

To think through who might be responsible for which tasks, you can ask each other three big questions:<sup>1</sup>

- 1) What does each partner bring?
- 2) What does each partner want?
- 3) What does each partner need?

Thinking through these questions together might help you to determine who is the primary contact for funders, for example, or who might be responsible for booking workshop space and purchasing/providing food for those workshops.

The determination of roles and responsibilities should also include consideration for general oversight of the project. You may choose to create a formal governance structure, for example, or to form committees that are responsible for ensuring certain aspects of the project remain on track. An example of these governance structures might include a finance committee that searches and applies for additional funding for the project, or a steering committee that ensures the project continues to work towards the project goals.

As the roles and responsibilities of each partner for your project are likely tied to project milestones and timelines, we have created a chart for you to document the decisions that you make together. You are welcome to record what has been decided upon in the chart on the following page.

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<sup>1</sup> Price, S.K., Foreman Kready, S.B., Mogul, M., Cohen-Filipic, K., & Davey, T.L. (2013). Partnership process guidelines: Social work perspectives on creating and sustaining real-world community-university partnerships. *Journal of Community Engagement and Scholarship* 6(1), 45-54.  
<http://dx.doi.org/10.54656/NBXF7998>

#	Project Milestone(s) and/or Output(s)	Anticipated Completion Date	Partner(s) Responsible
1			
2			
3			
4			
5			
6			
7			
8			

## Outlining Communication Expectations

While speaking about how you might communicate throughout your partnership might seem trivial, there may be differences in communication styles between partners that need to be explored. Community member partners might prefer phone calls outside of traditional business hours, for example, while academic research partners might prefer emails during traditional business hours. Considerations for communication, therefore, might include preferred methods of communication, hours of communication, and the time in which partners expect a response while communicating. Outlining these expectations and coming to an agreement about how to most effectively communicate with each other might help to mitigate potential miscommunications throughout the partnership.

While it's helpful to talk through the ways that you might best communicate, we also know that these things can change depending on what you're communicating about. You might need an extended period of time to review a large document, or you might need to consult with others before you craft a response. Although it may feel impossible to account for the many different ways that communication throughout your project might happen, having transparent discussions about what to expect can be helpful for building trust in partner relationships.

Partner	Prefers to communicate...	
	How?	
	When?	
	Typical response time? If it depends, what does it depend on?	
	How?	
	When?	
	Typical response time? If it depends, what does it depend on?	
	How?	
	When?	

	Typical response time? If it depends, what does it depend on?	
	How?	
	When?	
	Typical response time? If it depends, what does it depend on?	

## Discussing Resources and Fees

Exploring which resources are available to the partnership can ensure that the partnership project is well supported. Resources can be understood a variety of different ways, and may include but are not limited to:

- Funding,
- Space,
- Supplies,
- Equipment, and
- Additional staff support.

In the table below, you are welcome to outline which resources can be made available and shared by each partner. Detail and transparency are always encouraged, such as disclosing dollar amounts of available funding or exactly which equipment might be made accessible for the project.

Partner	Resources


In addition to discussing the resources that are available to the partnership, it is also wise to have upfront and direct discussions about certain fees and service costs that may be incurred over the course of the project.

We encourage you to consult the Fee Structures and Guidelines to adequately consider the costs associated with your project.

While we understand that discussions and fees may sometimes feel uncomfortable, having transparent communication and clear expectations can help to facilitate trust and confidence in the research relationship. You are welcome to document the decisions that have been made about fees and service costs in the table below.

Service Offered	Fee Agreed Upon	Fee Paid To	Date/Milestone Paid By


As you work through these conversations about resources and fees, you may determine that it could be helpful to pursue funding (or additional funding) for your project. We have compiled a list of Potential Funding Sources that may be useful for you to consider, and you are welcome to consult this list and determine what might make the most sense for your partnered project.

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## Understanding Data and Art Ownership and Sharing

Collaborating on a data management plan is an important part of ensuring that the data for your project is collected, stored, and shared in a safe and ethical way.

Please refer to the [Data Management Plan Template: Thinking Through Data at the Intersection of Art and Research](#) to facilitate and agree upon how you will manage data for this project.

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## Articulating Expectations for Authorship, Acknowledgement and Credit

You may be approaching this project with some ideas about what you hope will be created at the end of it. Researchers might be hoping to publish journal articles or present at academic conferences with the data that was collected, for example, or there might be a vision for some arts-based knowledge mobilization such as the creation of an infographic or video. Alternatively, you might be approaching this project with the intention to showcase art as data, in which case you could be envisioning an exhibition or theater production.

Regardless of how you intend to share what you create out of this project, it is important to make sure that credit is given where credit is due. For outputs in which something is created with the data collected, this might include co-authorship on journal articles or citing the artist who created the infographic. For outputs that showcase the art as research, this might include the application of a Creative Commons Attribution License<sup>2</sup> so that work can be reproduced with credit given to the original artist. There might be additional considerations that need to be made

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<sup>2</sup> <https://creativecommons.org/>

if artistic outputs are going to be shared on social media platforms, and artists might appreciate being credited through tagging or reference to their broader artistic practice.

While the intended outputs might shift and evolve over the course of time that you work together throughout this project, it will be valuable to keep these considerations at top of mind and to keep track of who is contributing to what. The Ethical Considerations Guidelines may be helpful for thinking through some of these nuances. As you continue working together and what you create together becomes more clear, having transparent conversations about who is granted authorship, acknowledged, or credited, will ensure that each partner feels that their contributions are recognized and valued appropriately.

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## Navigating Layered and Nuanced Research Relationships

Research and art both have the potential to elicit some key differences in perception and understanding from artists, researchers, participants, and communities alike. Disciplinary differences, for example, might mean that each partner might have different ideas about what the most important aspect of a project is.

An example of these disciplinary differences may help to illustrate this further. In a previous partnership project, artists and researchers collaborated on a project that produced audio recordings and written transcripts. Following the collection of these pieces of “data” and once the recordings had been transcribed, the audio recordings were deleted.

While the deletion of audio transcripts is often considered to be standard practice in academic research spaces, the artist partner on the project expressed that they thought the audio transcripts could have been further used to create auditory art for knowledge mobilization. Their perspective had not been considered before the deletion of data, which revealed a large discrepancy in the ways that the research partner and the artist partner understood the ways that data was handled and used.

Conversations around differences in disciplinary standards prompted partners on one project to start using phrases starting with “in my world...”, which helped to facilitate discussion about the ways in which data is typically cared for in their fields.<sup>3</sup>

As a guide to facilitate further thinking about the nuanced and layered nature of research relationships, we encourage you to review and discuss the Ethical Considerations Guidelines.

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<sup>3</sup> Vosters, H., Graham, C., Sinding, C., Vengris, J., Perry, A., Skene, M., & Nouvet, E. (2021). *Transforming Stories, Driving Change: Bringing new voices into public debate through performance*. Online workbook: eCampus Ontario Open Authoring Platform. <https://ecampusontario.pressbooks.pub/transformingstoriesworkbook/>

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## Honouring the Partnership Process

Partnership requires ongoing, collaborative effort, and it is in the best interest of all partners to honour it as a process. As you have worked through this partnership agreement, we would like to remind you that what you've agreed upon has the potential to be edited and amended as the trajectory of your project progresses.

To facilitate the process oriented nature of partnership, we encourage you to engage in conversation about how often you would like to communicate and meet with each other to check-in about the status of the project.

How often would you like to communicate with each other about the project?	
How often would you like to meet to talk about the progress of the project?	
Who will be responsible for coordinating these ongoing progress meetings?	
Who will be responsible for taking notes at these progress meetings?	
Who will check in with each partner prior to each meeting to check for updates and create a meeting agenda?	
Who will circulate notes and meeting agendas? How far in advance of each meeting?	
Next meeting date:	

# Partnership Agreement

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Once you have worked through the Partnership Agreement: Guidelines for Partnership together, you are welcome to formally agree to what you have discussed and decided upon in your partnership by signing this Partnership Agreement.

Before signing this Partnership Agreement, ensure that you have discussed and worked through the components that are relevant and useful to your project:

- [Naming Partners,](#)
- [Identifying Common Goals,](#)
- [Articulating Project Milestones and Intended Outputs,](#)
- [Establishing Timelines,](#)
- [Defining Roles and Responsibilities,](#)
- [Outlining Communication Expectations,](#)
- [Discussing Resources,](#)
- [Understanding data and art ownership and sharing,](#)
- [Articulating expectations for authorship, acknowledgement, and credit,](#)
- [Navigating layered and nuanced research relationships,](#) and
- [Honouring the partnership process.](#)

I, the undersigned, understand and agree to the Partnership Agreement that has been created for the partnership project titled “\_\_\_\_\_.” I agree to adhere to this Partnership Agreement to the best of my abilities.

\_\_\_\_\_  
Signature of Partner A

\_\_\_\_\_  
Date of Signature

\_\_\_\_\_  
Printed Name of Partner A

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Signature of Partner B

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Date of Signature

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Printed Name of Partner B

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Signature of Partner C

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Date of Signature

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Printed Name of Partner C