



A Checklist for Developing a Partnership Agreement or 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, partners will find a list of specific items that may be included in a written agreement or contract or addendum. This document provides a list of specifics that partners might include in a written agreement, although not every item needs to 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 Decisionmaking
 - b. Communications
 - c. Oversight
 - d. Recordkeeping and Documentation
- V. General Administrative Elements

	Not Yet Addressed	Under Decision	Finalized	Action Steps
I. General Information (often introductory)				
General statement of the agreement's purpose				
Partners' affiliation 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				
II. Partnership Services				
Number of children served; hours, days, weeks of operation				
Location of services				

	Not Yet Addressed	Under Decision	Finalized	Action Steps
Each partner’s role in service delivery: child education, child and family health, mental health, disabilities, nutrition, family services and parent involvement, home visits or conferences, meetings, recordkeeping, transportation, supervision, oversight (aka: Head Start Performance Standards)				
Staff assigned to support the partnership; which entity or partner employs and supervises which staff				
Responsibilities of each partner’s staff				
Staff schedules				
Supervision procedures				
Staff qualification requirements				
Professional development responsibilities (in-service, training, college courses)				
Personnel employment strategies				

	Not Yet Addressed	Under Decision	Finalized	Action Steps
Annual performance appraisal procedures				
Provisions for qualified substitutes				
III. Fiscal Resources				
Funding or resources are accessed and a commitment is made by each partner				
Payment per child, per year by partners and payment procedures				
Alternative plans are made for circumstances beyond partners' control				
Funds targeted or designated for specific improvements (renovations, salary enhancements, quality issues)				
Designated responsibilities for: facilities or space, maintenance, repairs, food service, and supplies and equipment (who will retain ownership of equipment when or if the agreement ends)				
Non-federal share or in-kind services				
Provisions for collection and non-payment of parent fees				



	Not Yet Addressed	Under Decision	Finalized	Action Steps
Provision for the loss of child care subsidies and parent fees				
IV. Systems				
A. Planning and Decisionmaking				
Role of each entity's decisionmaking bodies in planning and decision-making				
Policy Council representation and elections				
Community assessment process				
Collaborative, inclusive strategies involving partners' staff and parents and the community				
Items needing prior approval (items a partner reserves the right to approve)				
B. Communications				
Type, frequency of meetings; meeting participants				
Type and frequency of reports				

	Not Yet Addressed	Under Decision	Finalized	Action Steps
Information exchange (training calendars, personnel policies, position openings, etc.; state and local licensing reports and QRIS status)				
Work with agencies on appropriate referrals as needed				
Use of technology (such as: shared databases for tracking, email communication)				
Protocols for information sharing				
Parent communications				
Dispute resolution process				
C. Oversight				
Notification procedures or follow-up on local, state, and federal monitoring and assessments and audits				
Ongoing observation of partnership operations, review of records, written feedback, follow-up				
Annual program self-assessments and other reviews				

	Not Yet Addressed	Under Decision	Finalized	Action Steps
Improvement initiatives (partners' obligations to each other when the partnership is not progressing as envisioned)				
D. Recordkeeping and Documentation				
Recruitment, enrollment applications, and intake				
Parent permission procedures				
Child screening, assessment, outcomes				
Curriculum planning and individualized child plans				
Parent contacts, home visits, parent-teacher conferences				
Disabilities, medical, dental services, nutrition, mental health, and family social services				
Storage of records and access				
Parent partnership plans				

	Not Yet Addressed	Under Decision	Finalized	Action Steps
Procedures for recording and tracking of services and follow-up				
Transfer of information, confidentiality				
V. General Administrative Elements				
Designated contact person for each organization involved				
Travel policies				
Liability and insurance				
Use of partners' names (how partners will publicize the services sponsored by the partnership)				

Photo courtesy of the Partnership Center.

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