Relationship Agreement Template

*Nā tō rourou, nā taku rourou, ka ora ai te iwi - with your basket and my basket the people will thrive*

# Background and kaupapa

This Agreement describes the mutual relationship between [**Community Organisation(s) Name**] and [**Funding Organisation(s) Name]**. This document is different from a traditional Funding Agreement in that it is not a one-sided document which covers funder expectations only. Instead, we are establishing a reciprocal relationship in support of the communities we both serve, and this Relationship Agreement sets out our expectations of each other.

[Name] exists to [state organisational purpose]. [The Funding organisation] would like to support [the Community Organisation] for the purpose of [set out specific purpose for this relationship agreement].

# Organisations and Key People

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Organisation / Funder name  | Role | Key Contact | Phone | Email Address |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# Commitments[[1]](#footnote-1)

| Aspect | Our commitments to each other *[example commitments included below*] |
| --- | --- |
| **Relationships** | Both [the Community Organisation] and [the Funding Organisation] will: * Be open and honest
* Prioritise the needs of communities
* Commit to mutual, ongoing learning
* Strive for culturally appropriate and mana-enhancing relationships
* Take a “no-surprises” approach and tell each other when unexpected or difficult things happen
* Resolve any disagreements through open kōrero
 |
| **Communication** | Both [the Community Organisation] and [the Funding Organisation]: * Will respond in a timely manner
* Will let each other know when key people change
* Will discuss and agree on any significant changes to the work, the organisation or the budget, before these are made
* Maintain ownership of their Intellectual Property and collateral, and will ask permission before using any images, stories or other IP.
* May publicly announce details of the project and who is supporting it, and may exchange logos to facilitate this
 |
| **Progress and impact**  | [The Community Organisation] will:* Provide updates on progress and impact at least annually
* Provide these updates on progress and impact through [set out process, e.g. in person, written report etc here]
* Be upfront about any challenges
 | [The Funding Organisation] will:* Take an active interest in the progress of the project
* Offer feedback and other non-financial assistance as appropriate
* Be supportive when things are challenging
 |
| **Money** | [The Community Organisation] will:* Provide proof of their bank account details to [the Funding Organisation]
* Confirm to [the Funding Organisation] that the money has been received
 | [The Funding Organisation] will:* Pay promptly according to commitments
* Provide confirmation to [the Community Organisation] when the funding has been deposited
 |

# Money

Details of funding to be provided are:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| [The Funding Organisation] | Amount | Year 1 Payment Date | Amount | Probable Year 2 date  | Amount | Probable year 3 Date  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| **Total** |  |  |  |  |  |  |

Additionally, where multi-year funding has been offered, payment of subsequent years is dependent on the trustees of [the Funding Organisation] being satisfied with progress and impact, and on the [the Funding Organisation] having funds available. This means that payment of future years funding cannot be guaranteed, although non-payment would be in exceptional circumstances only. Should such circumstances occur, [the Funding Organisation] will notify [the Community Organisation] as soon as practicable and discuss implications in an open and supportive manner. Similarly, [the Community Organisation] may choose to decline funding if the need has changed or the alignment isn’t right.

# Signatures

We agree to support each other and work together according to this Relationship Agreement:

|  |  |  |  |
| --- | --- | --- | --- |
| **Organisation**  | **Name of representative (CE or Trustee)** | **Signature** | **Date** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

*This Relationship Agreement template was developed by Kate Frykberg, Ani Pahuru-Huriwai, Helen Anderson and Steven Moe in 2020 as a result of a project between Te Aroha Kanarahi Trust and a group of funders (Todd Foundation, Tindall Foundation, J R McKenzie Trust, Te Muka Rau, Vodafone Foundation and Trust Tairawihti). See* [*this blog*](https://kate.frykberg.co.nz/) *for more background information.*

*This Relationship Agreement template is freely available for use and adaptation. We welcome feedback, suggested improvements and examples of how it is used in practice - please contact* *kate@thinktank.co.nz*

1. For collaborative projects involving more than one community organisation and/or funding organisation, include any organisation-specific commitments in an attached appendix. [↑](#footnote-ref-1)