

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

Commitments¹

Aspect	Our commitments to each other <i>[example commitments included below]</i>
Relationships	Both [the Community Organisation] and [the Funding Organisation] will: <ul style="list-style-type: none">• 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

¹ For collaborative projects involving more than one community organisation and/or funding organisation, include any organisation-specific commitments in an attached appendix.

Aspect	Our commitments to each other <i>[example commitments included below]</i>	
	<ul style="list-style-type: none"> Resolve any disagreements through open kōrero 	
Communication	Both [the Community Organisation] and [the Funding Organisation]: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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 Tairawhiiti). See [this blog](#) 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