



Collaboration Charter

What is it? The Collaboration Charter is the operating agreement that defines how the collaborative work will get done.

Elements of the Collaboration Charter

1. **Mission/Purpose**

Guidelines: Answers the question of “What good, for whom?”

2. **Values/Assumptions**

Guidelines: If applicable, states basic assumptions important to the collaboration.

3. **Vision**

Guidelines: A statement of the desired future. Answers the questions:

“What is different in the world in 3-5 years because this collaboration exists?”

“What role did the collaboration play in creating that difference?”

“What partners were involved in creating the difference?”

4. **Constraints**

Guidelines: If applicable, constraints can be set by the partners, funders, regulators, or others.

5. **History**

Guidelines: An optional section; becomes more important if the collaboration grew out of something else, or if the collaboration has evolved over time and understanding that history would be helpful for new members.

6. **Timeline and Milestones**

Guidelines: Includes all significant milestones with the timeline; these will serve as a roadmap for the collaborative as a whole.

7. **Members and Membership**

Guidelines: Identifies the current leaders, members, and the unique niche in the collaborative each fills. Describes any guidelines for adding or changing members. If appropriate, describes different classifications of membership.

8. Roles and Contributions

Guidelines: Clearly outlines the specific role of each leader and member (or each type of member). Outlines specifically the contributions each is expected to make. Establishes ground rules for leaders and members.

9. Policies

- A. Competition
- B. Conflict of interest
- C. Financial relationships
- D. Constraints

Guidelines: Policies can be set by partners but also by funders, regulators, or others. Includes competition guidelines (such as how to address one member applying for funds for which the whole collaboration is applying) and a requirement that each partner disclose their self-interest up front.

10. Norms and Ground Rules

- A. Participation
- B. Decision-making
- C. Communication
- D. Conflict
- E. Meetings

Guidelines: Explains specifically how the group deals with needs, conflict, decision-making, and communication of all types, both within the collaborative group and outside of the group (to the community and other stakeholders).

Date of original agreement _____

Date of revision(s) _____