

# COLLABORATIVE AGREEMENT TEMPLATE

## BACKGROUND:

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The Ontario Trillium Foundation (OTF) recognizes and supports collaborative arrangements that meet OTF eligibility criteria and funding requirements and through common purpose and shared responsibilities will produce good community outcomes.

A collaborative is made up of two or more organizations that wish to achieve a common goal, are prepared to work towards a mutual benefit, and share decision-making and accountability. A collaborative may include both eligible and ineligible organizations who are in good standing and do not engage in discriminatory or political/advocacy activities.

In order to submit an OTF application, the Collaborative Lead (The Applicant) must meet OTF eligibility requirements. Refer to the [Eligibility Policy](#) and [Collaborative Applicants Policy](#) for more information.

OTF requires that collaborative applications must have in place, at the time a request for funding is submitted, a formal signed collaborative agreement that outlines project expectations, roles and responsibilities of Collaborative members and details shared decision-making, conflict resolution and accountability.

As per OTF's [One Application per Deadline Policy](#), an organization (including an organization acting as a Collaborative Lead) is limited to one application per deadline across all granting programs

## SECTIONS OF A COLLABORATIVE AGREEMENT

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Include the following sections in your Collaborative Agreement:

- A. The Collaborative Lead** - The Collaborative Lead is considered the applicant and grantee once an application is approved. The Collaborative Lead signs the Grant Contract, accepts the OTF funding, and assumes all legal and fiscal responsibility and accountability with respect to the funded project, contract, and all required reporting. The Collaborative Lead must also be an active member of the collaborative. Please include the Collaborative Lead organization name, business location and contact information.
- B. Signatures** - OTF's funding of a collaborative project requires the collaborative agreement to be signed by all of the officially recognized members of the collaborative. A person with signing authority from each member of the collaborative signs and receives a copy of the collaborative agreement. For each signatory please include the person's name and position, organization name, contact information, and date signed.
- C. Purpose** – Include a brief explanation of why the collaborative was formed, who will benefit and how collectively the collaborative will achieve the OTF funded project's outcomes.
- D. Term of the Collaborative Agreement** - Provide the start date and end date of the project related collaborative agreement.

## E. Names, roles and responsibilities of collaborative members (include the Collaborative Lead)

- Provide the name, address and contact information of the organizations / groups that are officially recognized as project related collaborative members.
- Identify each officially recognized member's roles, responsibilities and contributions in achieving the project outcomes.

## F. Management of Funds

The Collaborative Lead is fiscally accountable for the OTF grant funds however, all members of the collaborative must be provided with regular financial updates to ensure the project funds are properly distributed, managed and recorded.

## G. Decision Making Processes

Document how decisions will be made and how conflicts will be resolved.

## H. Communication Plan

Document the communication strategies which will be used to keep the collaborative connected, engaged and informed. Consider how and how often will collaborative be informed.

## I. Intellectual Property

Determine and document who will own any intellectual property developed through the project.

## ASSESSMENT OF COLLABORATIVE APPLICATIONS

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OTF may request your collaborative agreement at any time, including during the assessment process

- Eligibility of Collaborative Lead.
  - a. As per the Eligibility Policy, the Collaborative Lead and Collaborative Members do not have a mandate or history of political or advocacy activities, such as furthering the aims of a political party; promoting a political doctrine; or persuading the public to adopt a particular political view and do not engage in discriminatory activities.
  - b. As per Eligibility Policy, OTF does not support flow-through funding (funds that will be reallocated to a third-party organization)
- Capacity of Collaborative Lead: funding history, financial capacity, project management capacity
- Capacity of Collaborative Members: Contributions from collaborative members align with the project outcomes, support the project activities, and the collaborative members involved have experience implementing similar projects.