Working Template

Partnership Brief Template

Turn an expression of interest into a focused account of the opportunity and the contribution it needs.

The Purpose Of The Brief

A partnership brief gives prospective participants a common starting point. Its purpose is to clarify the commercial reason to collaborate and the questions for an initial discussion. It is not a term sheet, offer, binding commitment or substitute for independent professional advice.

Opportunity And Intended Outcome

Describe the project or business requirement in a short paragraph. Identify the people or organisations it would serve. Explain why a collaboration may be useful and the stage the opportunity has reached.

Contributions And Responsibilities

Describe the resources or expertise already available, the contribution sought and who can authorise further work. Keep existing capabilities separate from proposed commitments. Note where specialist assessment or verification will be needed.

Working Arrangements To Explore

List questions about decisions, information sharing, reporting, interfaces and the handling of disagreements. These are discussion points for the parties, not agreed governance terms. The appropriate level of detail depends on the scale and stage of the opportunity.

Evidence And Next Discussion

Summarise relevant evidence that can be shared appropriately. Record the next decision, proposed participants and any timing dependency. Detailed agreements and due diligence should be scoped separately with competent advisers.

Keep The Initial Exchange Proportionate

Begin with non-confidential context. Do not include identity documents, sensitive financial records or material you are not authorised to share. Establish suitable arrangements before exchanging detailed project information.

Partnership Working Notes

Use these prompts for a non-confidential first brief. This worksheet creates no agreement or commitment.

What is the opportunity and intended outcome?

What can you contribute and what is required?

Which evidence is available and which questions remain open?

What should the next discussion help decide?

Read online at /insights/resources/partnership-brief-template/ on the APDC website. Initial enquiries can be prepared through the contact page. This guide does not establish an engagement or guarantee an outcome.