

How to Build a Working Agreement

(pg. 1)

To develop an agreement that is both useful and friendly, work through the following three-step process, which ends with the working agreement.

First, flesh out a partnering proposition. This is similar to a project proposal but without the fine points. It describes in brief what partners want from the relationship and what they can potentially bring to it. It is different from a project proposal in that it is necessarily broad based and short on detail. It serves more as a platform for discussion than as a plan. The partnering proposition is the crucial first step on which to build the working agreement. The partnering proposition should answer the following questions as clearly and concisely as possible:

1. What do you want to achieve?
2. What specific results are you seeking?
3. Whom are you trying to help or reach out to? Where are they located? How many people could potentially be affected by this project?
4. How do you plan to carry out the project?
5. What major milestones must be accomplished?
6. When will the project begin and end? If it involves stages, what are the stages and when do you expect to complete each one?
7. What will the project cost? Over what period of time are these costs projected?
8. What benefits do you expect from an alliance with (name of organization)?
9. What role(s) do you expect (name of organization) to have? For example, providing funds, personnel, technology, and so forth.
10. What amount of funds will you request, if any, from (name of organization)? When are the funds needed?

Second, review and discuss general principles and policies for cooperation. Drafting an official statement of guidelines for cooperative work can facilitate this step. This is where you draw up ground rules as discussed in Chapter 3 and finalize the document. This would include general terms and conditions, such as what happens when the partner doesn't like your performance, changes the plan halfway through the project, or you run into an unexpected obstacle. Important disclaimers should also be included, such as conditions under which you are not responsible for problems and delays. This document does not have to be signed, but it should be referred to in the working agreement. Partners International, for example, publishes a general set of guidelines for review and discussion in Our Pledge to You (See Partnership Resources: Two).

Excerpt from Making Your Partnership Work by Daniel Rickett (Smashwords Edition).
Copyright © 2014. Used by permission.

Daniel Rickett | www.danielrickett.com

How to Build a Working Agreement

(pg. 2)

Third, prepare the working agreement. This may be either a standard form in which you fill in the blanks, or a customized letter of agreement. Either way the best agreements are short and uncomplicated. They should include:

1. The name and description of the project, including estimated size and scope
2. Reference to the partnering proposition (a copy should be attached)
3. The schedule and deadline for completion
4. The amount and schedule of funds/grants (How much money are you providing and when will the partner get it?)
5. The number, role and reporting relationship of personnel (who will be working closely together)
6. Reference to the ground rules (principles and guidelines for cooperation)

It is assumed that both partners will have a chance to make changes before giving final approval. A fourth step may be necessary for long-term or large-scale projects. An extensive project may be organized into discrete phases and a new agreement written for each phase. Details of a particularly complicated phase may also be included as an addendum.