

## Partnership/Collaboration Agreements

A Partnership Agreement is all about PROCESS: it doesn't have to be a legal document although it could form the basis for one. The best time to formulate the Agreement is before work on the project starts. Even if you didn't do a formal 'agreement', you could use aspects of this very informally, because the thinking behind it will help collaborations to grow healthily. ACW sometimes requires them.

Agreements can be philosophical, spiritual and reflective as well as practical and actionable. They are about developing 'group norms' and 'working agreements', posing questions that dig deeper than what might otherwise be seen as an administrative task.

In complex collaborations, or collaborations that involve a range of different partners with different experiences/backgrounds/cultures/languages/resources, a negotiated Agreement might be particularly important in helping us understand how an oppressive work culture can develop or be defaulted as normative, and how to act and build differently eg Who benefits from an 'expected normative' culture? Who has vested power in presumed definitions of efficiency and success? What helps to be 'seen, heard and valued'? What helps to 'heal a harm' - what is a reparative process of reconciliation?

This kind of process can help:

- ✓ Create a new shared space, underpinned by shared values, rather than defaulting to cultural norms of a 'lead partner'
- ✓ Clarify the working arrangements of the collaboration
- ✓ Anticipate problems before they happen, and to agree how to deal with them
- ✓ Build equity, trust and clarity among the collaborators.

### Step 1 – Buy in and preparation

- Raise the *idea* of a creating a collaboration agreement with your collaborators, why you think it might be useful, how we might go about it, the sort of shape it might take.
- Ask collaborators how they feel about it, and work through their hopes and concerns about building an Agreement, making space for alternative suggestions for achieving the same results in a different way [and follow these, rather than pursuing your initial idea if that is what works for your collaborators!]
- If there is agreement to have an Agreement process (!), ask collaborators to give some thought, in advance, about what sorts of things they might like an Agreement to cover
- Prepare the a list of broad categories that might be discussed [see below for broad category suggestions]. These will be added to at the meeting but it is helpful to have a starting point.
- Check about 'location' (virtual or physical) of the meeting with your collaborators, and any requirements that will be needed for all to be able to fully take part (language, timing, place, signing etc)
- Decide who is going to facilitate the Agreement discussion(s). Ideally it would be someone outside the collaboration, who does not have a stake in it, but if that's not possible (and it usually isn't!) then consider who has the strongest skills/who is best placed to do it.

## Step 2 – at the meeting (s)

- Make sure that **all the key collaborators are present** at the meeting at which the Agreement is formulated. This is very important – if some of them can't make it, change the date!
- Allow a minimum of one hour, but preferably **2 hours**. (NB Where there are still fundamental and difficult issues to resolve such as complex or controversial aims and objectives, these will need far more time and almost certainly a session dedicated to that topic alone).
- At the meeting, put up a list of the broad categories of the Agreement and add / amend them with the partners. Each Agreement is different and this process of defining categories together will ensure that it is not imposed, but rather created together. The process is as important as the end product!
- Go through each category and discuss. As a rough guide, divide your time into three, one for each of the three main sections suggested below. If there are a lot of collaborators you can put them in small groups, or pairs, and get each to take a different category, and draft ideas for discussion with the whole group. Before you leave each category, check that everyone can *live with* what has been agreed. If possible, share the wording as part of the meeting rather than writing it up later.
- At the end of the meeting agree what is to happen next. You may also like to review how the meeting went in order to learn from the experience.

## Step 3 – after the meeting

- Circulate the draft Agreement, and give people the opportunity to comment. If there seems to be quite a high level of disagreement / concern then you should arrange for the next collaborators' meeting to revisit the Agreement – you should not try to settle it all outside the meeting.
- When everyone is happy with the Agreement, circulate a final version in whatever form works for your collaboration. It is useful to include the names and organisations of all the Partners to the Agreement, and the date.

## Step 4 – Amendment and review

If the collaboration is relatively long term (longer than just a few months) it is useful to set a review date for half way through, or maybe annually, or to have a continual process.

- ✓ how is this working for you?
- ✓ Are there things you want to change, add or remove?

## Possible categories for inclusion in a partnership agreement.

Here are some standard categories, including issues you may want to cover within them.

### 1. Aims (hopes, goals) of the collaborative project

This may seem obvious, but don't skip this! Even if you already have some wording for the project aim, each collaborator will have their *own* hopes for the collaborative project. They will also have their own language and way of expressing them. Explore differences and create a *new way of expressing your shared aim together*.

The resulting aim (or goals or vision) maybe be short, or longer and descriptive, whatever galvanizes your collaboration.

As noted earlier, this can be a very substantial and important step that needs addressing over a longer timescale than one slot in a two-hour meeting!

### 2. Values and ways of working

This is where you will discuss the values underpinning your collaboration, how you will work together in ways that create a *unique space and culture* suited to your project and collaborators. How will we flourish together *and* achieve our aims? This is a place for collaborators to raise needs, and for questions of practices, structural inequalities and issues of power.

The important thing is to work with a manageable number framed in action. Asking questions like if/when/how. A list of 20 agreements is not useful if it's just a list, or if it's simply memorised. We can say things like 'we agree to respect each other' or 'we will work in a flexible way', but what does that mean in terms of what does it look like? What does it sound like? What does it feel like?

The discussions in this section will influence the next.

*[If time is short, it is good to break here and deal with practicalities in another session].*

Here is an example from José G. González of what he'd cover under a working agreement to 'commit to ego check' .....

## EGO CHECK

### 4. Commit to Ego Check

This one captures a lot of self work. One of the Jemez Principles notes this as "Commitment to Self Transformation."

Here is a lot of the work on reviewing and understanding your POSITIONALITY (social and political context that creates your identity in terms of race, class, gender, sexuality, and ability status-- and how it influences your understanding of and outlook on the world, as well as privileges derived).

You are examining constructs & adaptive measures that centers "normal" for you, how that can be different for others, and actions to take to create space for that. This can be practices of "WAIT" (Why Am I Talking) and checking your "Arrogance of Expertise" (not presuming others SHOULD "get it" just like you).

It's work to separate the little egoistical voice from true intuition and practices of healing in, with, and for community. Leading with HUMILITY.

### 3. Practicalities

#### Roles and responsibilities

- ✓ What roles do we each have? What are we contributing? What can we expect?
- ✓ What are the responsibilities of individual members of the collaboration?
- ✓ How much variation/freedom do we have to change what we are doing?
- ✓ How will decisions be made and by whom?
- ✓ How do we raise needs or concerns?
- ✓ How do we induct a new member?

#### Resourcing

- ✓ Where will any money be held?
- ✓ How will other resources/contributions be valued/accounted?
- ✓ Invoicing and payment
- ✓ Record keeping
- ✓ Expenses –what level can be claimed, for what, when
- ✓ Budget overruns / underspend / responsibility for debts

#### Essential early planning

- ✓ To what outcomes/processes/timetable are we working (if any)?
- ✓ Any critical dates or milestones to agree?
- ✓ Any specific actions that we need to agree now (in order to take forward our aims etc.)?

#### Communication within the collaboration

- ✓ How will we communicate? In what medium? In what language(s)? How often?
- ✓ Will we have meetings? How, when, why, where?
- ✓ Will we do reports?
- ✓ How does someone raise a problem?

#### External profile

- ✓ How/when/why will we communicate to others outside the collaboration?
- ✓ How do we want to attribute work (to individuals/the collaboration)?

#### Evaluation

- ✓ How will we evaluate how we are doing?

*Scenarios – planning for all eventualities! This is a really effective way of airing fears as well as dealing with them effectively. Ask for any potential scenarios and work through them eg*

- ✓ What do we do when an agreement is broken, or harm is inflicted? This is important for when a mistake will be made, there is harm, and you need to practice how to move with it, tend to it, and create space and action for healing.
- ✓ What do you do if someone regularly fails to attend meetings, or if they fall sick?
- ✓ What to do if someone wants to leave?
- ✓ What if something doesn't work as we expected it to, or is not possible (eg...)