

Charters, Agreements, and Handshake Deals



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Put It In Writing!

The more partners in the project,
the more you need to memorialize any agreements

It isn't that people are mean or malicious, it's just that
we are all busy academics

Often, we forget our agreements and thus end up not
delivering on them

Put It In Writing!

If it is in writing, you can't ignore it

If it is in writing, others can't avoid it

If it is in writing, there is “hypothetically” an even playing field for everyone

Charters

Statement of shared values

Statement of goals

Type of products

Rules

documentation

citations/attributions

publishing and credit

communication

roles and responsibilities

appropriate behaviors

Line Items

licensing

credits

partnerships

preservation

access to products

Agreements

- access to resources
- access to staff

while agreements can contain the same information as a charter, an agreement does not necessarily have to be signed by all parties within a project

Agreements

the most common type of agreements are:

- limited term access to a resource
- “hidden” partnership agreements
- project manager to staff member agreements (i.e. if you do x then we’ll give you time to do y)

Pros

Charters and Agreements can:

- aid you in getting the entire team on the same page
- create useful opportunities for dialogue
- can allow your team clear grievance processes
- places the onus on the entire team to comply rather than one individual

Cons

Charters and Agreements:

- Don't address issues of inequality and status directly
- Often get used once the project begins, but what works isn't what was agreed to
- Have to be continually updated with changes

Frequent Collaborator Discount

Trust is irreplaceable

Once trust is in place, repeat projects together

Collaborators can earn leeway

Handshake Agreements

Be wary of untested partners who aren't amenable to formal agreements (even if only in email)

Be sure when the project relies on a handshake that if that handshake deal fails, the project can recover

Know when to use a handshake to avoid bureaucracy

Credits

Jennifer Guiliano

Simon Appleford

“Charters, Agreements, and Handshake Deals”

www.devdh.org



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