

# Charters, Agreements, and Handshakes

Lord, save me from my partners,  
colleagues, and boss

## 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 is just  
that we are all busy

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

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

duration of access

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