

# Planning Agreement

This document is intended for IHEU Member Organizations joining the IHEU Membership Twinning Programme.

A partnership will usually consist of:

- an organization which is newer or less well-developed, which we call the **Root partner**
- a more well-established organization, which we call the **Branch partner**

Ideally, representatives from both the Branch partner and the Root partner will work through this document together face to face, with the support and guidance of an IHEU representative. It is not intended as a bureaucratic exercise, but as a chance to:

- further understanding between partner organizations (of each other's situation, goals, resources, etc)
- come up with ideas
- describe any constraints in the partnership

## Details of Root Partner

<b>Name of Organization</b>	
Vision and mission of the organization	
What does your organisation do?	
What does your organisation believe?	<i>(What are your core values/principles?)</i>
How is your organisation governed?	<i>(Do you have Board of Directors?)</i>
Who regulates your organisation? (Government, NGO Board?)	
<b>Name and role of the primary contact</b>	
Email	
Telephone	
Address:	
<b>Name and role of the secondary contact?</b>	
Email	
Telephone	
Address	
How will this person be engaged from the outset?	
In what circumstances would this person take over as primary contact?	

## Details of Branch Partner

<b>Name of Organization</b>	
Vision and mission of the organization	
What does your organisation do?	
What does your organisation believe?	<i>(What are your core values/principles?)</i>
How is your organisation governed?	<i>(Do you have Board of Directors?)</i>
Who regulates your organisation? (Government, NGO Board?)	
<b>Name and role of the primary contact</b>	
Email	
Telephone	
Address	
<b>Name and role of the secondary contact?</b>	
Email	
Telephone	
Address	
How will this person be engaged from the outset?	
In what circumstances would this person take over as primary contact?	

## Listening and understanding each other

What are the needs/priorities of the Root partner?	
What are the expectations of the Root partner?	

What are the needs/priorities of the Branch partner?	
What are the expectations of the Branch partner?	

## Planning together

In one sentence, why are you starting a partnership together?

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What will your partnership do? *(Tip: focus on outputs/activities, not abstractions. The partners' responsibilities should include between you everything that is needed to work on the activity.)*

**Note:** Copy and paste the following table as many times as needed

Activity	<i>(Describe what will be done and what the output will be)</i>
Purpose	<i>(What needs does it meet? What problem does it solve? What aim is met?)</i>
Root partner responsibilities	<i>(What will the Root partner need to do to make this activity work?)</i>
Branch partner responsibilities	<i>(What will the Branch partner need to do to make this activity work?)</i>

Activity	
Purpose	
Root partner responsibilities	
Branch partner responsibilities	

Activity	
Purpose	
Root partner responsibilities	
Branch partner responsibilities	

Activity	
Purpose	
Root partner responsibilities	
Branch partner responsibilities	

Activity	
Purpose	
Root partner responsibilities	
Branch partner responsibilities	

## Understanding the challenges

What are the concerns of the Root partner?	
What are the concerns of the Branch partner?	

What could go wrong with your partnership plan?

*(Tip: Ask yourself if anyone could be worse off as a result of the partnership if something goes wrong, including both partners and any external people or groups. As yourself what negative consequences could any of your activities have?)*

What could go wrong? <i>(These are the risks)</i>	How will you try to avoid this? <i>(This is your mitigation plan)</i>	What will you do then? <i>(This is your adaptation plan)</i>

## Communicating together

When and how frequently will you communicate?	
How will you communicate (phone, text, email, Skype?)	
How will your regular communications be structured and recorded?	

## Reviewing your success together:

What do you want to achieve, and by when?

Assessment time	What will you achieve by now?	What will you each do in case of delay?
<i>(6 months, 1 year...)</i>		

When and how will you stop to assess if your partnership is succeeding?	
How does each partner raise concerns, issues or challenges during the partnership?	
When and how are you going to review and update this agreement?	

## Agreeing the finances

Include here details about all possible allowances, remuneration and reward for individuals or any programme funding for the organization. You should agree that anything which is **not** agreed here cannot later be added to the budget without both sides agreeing to the addition.

What benefits will individuals on the Branch side receive during this partnership?	
What benefits will individuals on the Root side receive during this partnership?	

Is your plan reliant on other contributions (e.g. external funding?)	
What will happen if you do not receive this external contribution?	

How will you decide what to spend money and resources on?	
How will you manage and safeguard money and resources on?	

## Ending the partnership

Under what conditions will the partnership end?

*(Tip: Think first about any conditions that would cause either partner to want to end the partnership prematurely. Then think about conditions under which you would both be happy to say the partnership had been so successful that it was no longer necessary.)*

What will happen after the partnership has finished? *(This is your sustainability)*

	What do you expect to see by this point?	During the project, what will you do to help ensure this happens?	After the project what could be done (and by who) if this doesn't happen?
Two months after end			
Six months after end			
One year after end			
Two years after end			
Three years after end			
Four years after end			
Five years after end			



## Reflecting on principles

Finally, it may be useful to think about how the work you have planned today reflects good, general principles of working together, as well as the values of humanism described in the Amsterdam Declaration. Provide reflections from each organization to each of the following questions. Where necessary, you might decide to go back and revisit earlier parts of this Agreement document.

### General principles of working together

How have we planned together, involving both sides?

Will we be implementing the plans together? *(Are their fair responsibilities on each side? Is their reciprocity? Is their parity/equality?)*

Is the work appropriate? *(Have you got carried away anywhere? Would anyone react with surprise to your plans in a way which should make you think twice?)*

Do we feel mutual respect, trust and understanding? How is this shown in your plans?

How is transparency and accountability built into our plans?

How have we made sure our activities will be effective in achieving their aims or addressing the needs they arise from?

Is the whole plan achievable and sustainable?

Will delivery of the plan do any harm to anyone?

Have we thought about interconnectivity? (*Think about other organizations and individuals. Is there some way we can do more by interacting more with others?*)

## Humanist values

The Amsterdam Declaration <<http://iheu.org/humanism/the-amsterdam-declaration/>> sets out a definition of Humanism. Below are some questions which draw on the values of Humanism as expressed in the Amsterdam Declaration. Your planned work might not be aimed at expressing all these values at once – however it probably should at least not *contradict* any of these values! Think about how your work might contribute to realising these values or any tensions there might be.

Is your plan “ethical”? Does it affirm “the worth, dignity and autonomy of the individual” and respect “the right of every human being to the greatest possible freedom compatible with the rights of others”? Does it uphold the “duty of care to all of humanity including future generations”?

Is your plan “rational”? Does your plan drawn on “human thought and action”, or are there any dogmas or hidden assumptions you should expose right now? We also believe “the application of science and technology must be tempered by human values” – so does any part of your plan get carried away by what *can* be done, without thinking about what *should* be done?

“Humanism supports democracy and human rights. Humanism aims at the fullest possible development of every human being.” Does anything in your plan contradict this? Could you uplift your plan to do anything more to help everyone – those delivering work, any beneficiaries, or the wider public – to develop as people and achieve greater fulfillment?

“Humanism insists that personal liberty must be combined with social responsibility.” Does you plan meet social obligations or achieve something for the good of society, or promote our “responsibility for the natural world”?

Since Humanism is “a response to the widespread demand for an alternative to dogmatic religion”, have you made sure you’re not doing anything that repeats the mistakes of dogmatic religion?! And since “reliable knowledge of the world and ourselves arises through a continuing process of observation, evaluation and revision”, could your plan be improved by building in more of this process?

“Humanism values artistic creativity and imagination and recognises the transforming power of art. Humanism affirms the importance of literature, music, and the visual and performing arts for personal development and fulfilment.” What opportunities for creativity among those delivering the work, any beneficiaries, or the public? Can these opportunities be magnified?

# Agreement

Signatory for Root partner organization:

Name:

Date:

Signature:

Signatory for Branch partner organization:

Name:

Date:

Signature: