Guide for Drafting a Partnership Agreement

The purpose of this guide is to assist potential partners in determining and discussing relevant issues before entering into a formal partnership. The majority of this document is not original with me, but rather is a compilation of earlier guides and actual covenant agreements that have served state conventions in this process. Here I am simply providing a practical guide for churches and associations to follow in forming their own partnerships.

Why have a formal document?

Admittedly, a formal agreement document may seem unnecessary. After all, we're all in the same family and have the same goal of reaching these people, right? Well, that's true, but in order to make sure that everyone is "speaking the same language," it is in the best interest of everyone to negotiate a formal agreement. The main purpose of the agreement is to state each party's intent and desire in forming the partnership and how it is going to facilitate the accomplishment of their goals.

The document serves to:

- Identify the partners
- Clarify strategy
- Set goals
- Stipulate the time frame
- Assign resp0nsibilities
- Define leadership roles
- Outline communication channels
- Elaborate evaluation methods
- Highlight special considerations
- Avoid conflict and misunderstandings

Composing a Partnership Agreement

The uniqueness of each partnership is reflected in its particular covenant agreement. However, there are many similarities in all partnerships, so a basic model can be used to get you started. It is strongly recommended that an external facilitator is utilized in the negotiating process and drafting of the agreement. This might be someone with the IMB or the PMD. This person can help minimize future misunderstandings, maintain equality, and lead the negotiations to include critical issues that might otherwise be overlooked. A poorly organized partnership can quickly lead to hard feelings and even harm the work through a bad testimony.

A sample document was developed years ago and has been used as the foundation for numerous partnerships. In the next post I will present it as a base upon which you can build your own agreement, adapting it as necessary.

In this section I will begin to go through a sample contract and add comments. The parts in italic represent what would be included in an actual agreement.

Partners

(Stateside Partner) i.e., Church, Association

(Overseas Partner) IMB missionary, national convention, or other entity

Naming the partners might seem unnecessary, but the responsible parties should be clearly defined in the beginning and representatives from those parties required to sign the agreement. One critical reason for this is to insure the continuity of the partnership even though there is a personnel change on either side.

The Leadership Team

(Stateside Coordinator) – Person representing stateside entity

(Field Coordinator) – Person representing overseas partner

Who will make the partnership function? Identify the key people who are going to make sure this partnership works! Remember, the job of everyone is the job of no one! These are the functional, proactive leaders (i.e., don't name the pastor unless he is going to actually be the one driving the partnership) who will be responsible for implementing the action plans.

EndVision Statement

The EndVision statement should clearly present the vision of what each entity expects "to see"" at the end of the partnership. What will be the result of the implementation of the partnership? What will the target area "look like?" One great way to understand this principle is to think of a jigsaw puzzle with the pieces of the puzzle in a pile representing the target area beforehand, and the finished puzzle representing how the field will look afterward.

Stateside Partner's EndVision: Example: At the end of the partnership we see a more mature, more mission minded membership ready to take on an even greater challenge. This will be evidenced by ___% having participated in the partnership at some level and increase evangelism among our members by ___ %.

Overseas Partner EndVision: Example: At the end of this relationship, we believe God will increase the number of churches by _____%; these churches will have members who know the scriptures, will be able to share their witness effectively to the point of reproducing itself in another congregation.

<u>Time frame</u>

The partnership will be for a period of <#> of years, <dates>, with an extension possible, if both agreed to by both parties.

Time limits vary, but having a targeted end time is essential, otherwise, things could drag on indefinitely with little getting accomplished. Generally, three years is a good number considering that the partnership may be extended if needed or desired. Negotiating an extension is easier than bringing a relationship to an early end. In other w0rds, it is better to negotiate an extension of a three year contract than enter into a five year contract and realize later it should have ended in three! The time should be designed to accomplish the intended strategy objectives. Remember: it generally takes longer than planned to accomplish something.

<u>Purpose</u>

(Example only) The purpose of this partnership is to assist the <mission team, national Baptists, IMB missionary, etc.> to proclaim the gospel to all of the <people group> peoples, and work with local believers to:

1. *Establish ten churches in these (list) key communities*
2. *Provide training in doctrine and discipleship and*
3. *Assist the new churches to start a new mission*

The overall strategy of the field should define the purpose of the partnership. IMB personnel are involved in a process of seeing God establish a church planting movement. A long-term commitment to partner can facilitate a purpose driven relationship so that all parties can participate in that process. Project action plans should be strategically and intentionally designed to accomplish the goals established by the field's strategy and the priorities to which the partners are both committed.

Note in the example above, the purpose statement is *measurable.* Remember, state the strategic purpose for the partnership. What do the partners want to accomplish? The more focused the purpose, the more likely it will be accomplished.

<u>Priorities, Goals, and Action Plans</u>

See Attachment 1(you might include a brief paragraph here about the major priorities of the partnership, but the Priorities, Goals, and Action Plans of the partnership should be an addendum to the original agreement in an attached document.

- **Priorities** are broad areas of focus (some might refer to these as objectives). They determine direction, serve as ultimate targets, provide the destination and represent focus areas.
- **Goals** are statements of intent of what you want to accomplish. They are result-focused and express an end result. Goals should be SMART: S – Specific, M – Measurable, A – Attainable, R – Realistic, T- Timed (dated).
- **Action Plans** are the tactics: these are things you do to accomplish the goals that have been identified for the partnership. These include the projects, activities, and events you conduct for the specific purpose of achieving the goal result. All action plans or projects involving volunteers should be designed to help the partners to develop the capacity or ability of meeting their own needs.

This strategy plan should be presented in an annual format for each year of the partnership. If it is a three year partnership, the first year needs to be very specific. Year two should be fairly specific, and year three can be general. Each year the plan should be reviewed and revised as needed.

Procedures and Responsibilities

This section clarifies who does what, how they will do it, and to whom they relate. It should be divided into the overseas entity and the stateside partner. Clearly defined roles are essential to the overall success of the partnership. Care needs to be taken to not overburden one party or person. Since leaders can change, write the procedures in such a way that new personnel can easily understand their role in the partnership. Example:

I. <Overseas Entity> i.e., IMB _________ Team, or other

1. *Volunteer requests:*
    A. *Will originate with the <overseas entity>*
    B. *<Overseas Entity> will submit a minimum of _______ project requests per year.*
    C. *<Overseas Entity> will submit requests for the following year no later than ______.*
2. *Field Orientation and De-briefing:*
    A. *Designated field personnel will provide appropriate field orientation when volunteers arrive.*
    B. *De-briefing of the volunteer's experience will conclude each project.*
    C. *Each team and project will be evaluated for effectiveness and needs for change*
3. *Logistical Support: <People group team or other overseas entity> will ensure that local volunteers, supplies, and other logistical items are in place to assist the volunteer teams from the <stateside partner> before the team's arrival (*this section needs to spell out who will be responsible for logistical support for volunteer teams).

4. *Funds:*
    A. *Any request for funds should be made clear in the original project request and appropriate approval channels utilized before proceeding. Safe and feasible* By

II. <Stateside Entity> i.e., Church, Association, or other

1. *Enlistment and Orientation:*
    A. *The <Stateside Partner> will enlist and orient volunteer personnel*
    B. *The <Stateside Partner> will keep the <Overseas Entity> informed of the progress being made to fill requests.*
    C. *When the <Stateside Partner> is unable to fill a request, they will give at least a ____ day notice to the <Overseas Entity>*
2. *Volunteer Qualifications:*
    A. *Shall be active members of a Southern Baptist church.*
    B. *Volunteers are screened by <Stateside Partnership> through use of a volunteer application form*
    C. *Volunteers must not have personal habits, such as alcohol or tobacco use, which would compromise his/her Christian testimony.*
    D. *The <Overseas Entity> will inform of other culturally objectionable behavior that must be avoided during participation.*
    E. *Each volunteer must have a background check done.*
    F. *Volunteers must be at least _____ years of age.* (Most often this is determined by the field).
3. *Volunteer Preparation:*
    A. *The <Stateside Partner> will develop trained and experienced team leaders*
    B. *The <Stateside Partner> will provide team orientation to cover issues such as travel documents, international travel issues such as vaccinations and security, travel tips, basic preparation, etc.*
    C. *The <Stateside Partner> will ensure that every volunteer is prepared to share a personal testimony*
4. *Expenses:*
    A. *The participating volunteer will be responsible for:*
        i. *Travel expenses*
        ii. *Travel insurance*
        iii. *Field costs such as room, meals, transportation, interpreters, etc.*
        iv. *Project related work expenses*
    B. *Field costs and project work expenses will be clearly stated on the volunteer request form.*

NOTE: It is important to consider the total costs involved. Most everyone reacts negatively to being told that they have to pay an additional amount due to an underestimation of costs. It is always better to have money left over than it is to have to ask volunteers for more funds.

5. *Reporting:*

Upon completion of the project, the team leader of the <stateside partner> will gather evaluations and testimonies from team members and forward copies of the evaluation to the <Overseas Entity> field coordinator.

Feedback through observations and testimonies is essential to improve future projects. Develop an appropriate evaluation form and take the time to read them.

Evaluation

A comprehensive annual evaluation of the partnership should be built into the overall goals and action plans. Navigating a long term partnership without evaluation tools is like driving a car down the highway without your fuel, oil, and temperature gauges, a speedometer, and other instruments that constantly evaluate the car's performance. The purpose is to review the objectives and goals and make any needed adjustments. This is the responsibility of the leadership team.

Special Considerations

A final section in the agreement can highlight any special considerations particular to the partnership. This may include specific guidelines for team recruiting, government regulations or restrictions of the host country, special instructions for construction projects, etc.

Signatures

The partnership agreement document should be signed by the Volunteer Coordinator for the Stateside Partner, and the Field Coordinator for the Overseas Entity. If the Volunteer Coordinator is someone other than the pastor of the church or the associational DOM, it would be advisable for the person in these positions to sign the document.