RE-AMP Organizing Hub

RE-AMP State Climate Table Partner Agreements

A guide for creating more transparent, equitable, just and effective ways of working together.

2016

Introduction

Since its start in 2005, RE-AMP has sought to help groups tackling climate change in the Midwest to think systemically and act collaboratively. In 2015, the RE-AMP Global Warming Strategic Action Fund (GWSAF) made this focus even more explicit. Through a shift in its funding, the GWSAF put a greater emphasis on building the capacity of climate and energy state tables to collaborate and build power in a more strategic and impactful manner, in addition to its continued funding of strategic opportunities for more immediate climate wins.

RE-AMP state tables are being asked to craft partner agreements, to undergird the climate movement in each RE-AMP state. This guide is aimed at providing members of these newly established state tables guidance on crafting state table partner agreements.

What is a partner agreement?

Partner agreements are negotiated agreements about how you will work together as a state table. It might include the norms of how you operate, your governance structure, how decisions are made, membership criteria, how joint funds are held and used, etc.

Why do we need partner agreements?

Partner agreements are useful because they ensure that everyone knows what to expect and how to engage each other; so that you don't have to spend every meeting trying to figure out how to figure things out; so that decision-making is easier, and it's clear to current and new members alike why you do the things you do and the way you do them.

My group already has an MOU for our issue campaign, can we just use that?

Maybe. That is to say, that you may be able to adapt it. But there is a lot in a campaign MOU that won't make sense for a state table. It may be helpful to refer to it when creating your partner agreement so that you have to entirely re-invent the wheel.

That being said, this process, which involves direct conversations and decisions about how to operate together, is nearly as important as the document itself, and is one of the first tasks of the state table. In some ways, state table partner agreements may not be very different from a campaign coalition MOU, in terms of the types of topics covered. You still have to discuss and include topics like how decisions are made and who gets to make decisions. But in these partner agreements there will likely be a greater emphasis on being inclusive and transparent for trust building purposes, because this is a long term proposition, focused on building power for the state-level movement. Another distinction is that it does not necessarily have campaign specific elements. For example, there may be no need to discuss a bottom line position, or what to do with lone wolf behavior, as you might have in a campaign coalition MOU. But because in almost every state, these are new efforts, with new goals, each state will likely need to embark on a new process for crafting partner agreements.

Who creates the partner agreement?

This is an iterative process. At first, you'll toggle back and forth between spending time on *who* makes these types of decisions and *what* the decisions are. It will feel messy and imperfect. That's okay. Start with what you have: a small coalition of the willing. With this incipient group, begin to flesh out what the goal of the table will be, according to those who are participating early on in the process. Next, figure out who else should be in the room to help you figure out a more defined goal and structure. Bring those people in. Discuss the goal and structure again. Create an intermediate governance structure, which might look like a Steering Committee with a few subcommittees. Next, decide who else should be in the room to make this a better, more robust table. Invite *them* and ask them to help make the governance structure even better.

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Maybe it won't take this many iterations, but maybe it will. Repeat as many times as necessary. At some point, you will hit something close enough for homeostasis, which will enable you to craft a written document that answers the questions in the next section.

What should it contain?

Partner agreements should contain the parameters and expectations of the partnership, including what the purpose or goal of the table is, who makes decisions and how decisions are made, how members join the table, etc. There may be additional questions you consider for your state table, but at a minimum, state table partner agreements should strive to answer the questions in the following section

Partner Agreement Discussion Questions

Purpose

1. What is the short term (end of the year) goal of our table?
2. What is the long term goal of our table?
3. What are our guiding principles?

Authority and decision-making

1. Who can make decisions regarding the table?
2. Will there be a table leadership team? (e.g. Executive Committee or Steering Committee)
   a. Who is on it?
   b. How will it be selected?
   c. What are the terms?
3. Will there be table subcommittees?
   a. What are they?
   b. What is their purpose?
4. How are decisions made (e.g., unanimity, unanimity minus one, 2/3 majority, simple majority)?
   a. How many votes does each group get (each individual gets a vote? One vote per organization? Etc.)
   b. Can votes be made via email? Conference call? Proxy?

Membership

1. Who are the current members of your state table?
2. What are the eligibility requirements for membership?
3. What is the process for adding new members?
4. What are the requirements of membership?
5. What are the benefits of membership?
6. How do members leave the state table?
7. Is there a way to remove members?

Communications

1. Who will speak to funders on behalf of the table?
2. How often will the table meet?
3. How is the agenda set for table meetings? Who sets it?
4. How and how often will table leaders communicate with members about decisions?

Resources

1. Who can be fiscal sponsor for the table?
2. Who controls and spends funds for the work of the table?
3. How and to whom are resources allocated?

What is the process for creating partner agreements?

We strongly recommend you go through these questions in a facilitated group discussion. Use the above questions to guide your discussion as a state table to create the elements of your partner agreements. The goal is to create a set of rules or norms that helps everyone understand how the table will function, and codify those in a written document as your state table partner agreement.

Remember, **form follows function**. Make your partner agreements only as complicated as necessary. Your function will follow from your goal as a state table.

A note about answering these questions: these are designed to be discussed as a group and agreed upon, rather than one group or individual answering the questions and submitting them for approval to the larger group, which would only reinforce a power dynamic you are trying to avoid. Alternatively, groups can answer each of these questions on their own and discuss their responses in the larger group. The point is, however, to have an open discussion about the responses to these questions so that everyone understands and is on board.

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Keep in mind that **it will be an iterative process**. Don't get paralyzed with the fear that all the "right" partners have to be in the room before you can talk and make initial decisions about a governance structure. Start somewhere, and refine it as more groups participate. It will feel messy and imperfect. Start the discussion with the people who believe that creating a state table would genuinely benefit the state-level climate and energy movement, and build your structure and table from there.

These are not easy or comfortable questions to wrestle with. At some point during this process, you will likely hit a point which facilitators like to call the "Groan zone." It's a point in a difficult group decision-making process in which participants feel fatigued and frustrated. Easy decisions and conversations don't often have a groan zone. Thorny, complex, confusing challenges do. And since the table will be discussing decision-making authority, resource control and equity through these questions, we can expect these will be potentially uncomfortable and challenging conversations. If your discussion gets stuck in the groan zone, know that the Organizing Hub can help. We can facilitate these conversations and/or offer you strategies for navigating out of the groan zone into areas of convergent thinking to reach decision points.

When do we update it?

You should consider the partner agreement a living document, one that gets revised and updated as necessary, but plan to revisit it at least yearly.

Where can we go for more help?

RE-AMP is here to help you throughout this process. Various members of the RE-AMP staff are available to help you, including:

- ✓ Membership lists, criteria, participation and engagement help: Jessica Conrad jessica@reamp.org
- ✓ General state table assistance: Sarah Shanahan sshanahan@cleanwisconsin.org
- ✓ Re-granting guidance: Gail Francis gail@reamp.org
- ✓ Coalitions, ground rules, meeting facilitation: Organizing Hub, Melissa Gavin melissa@reamp.org

In addition to these staff resources, here are some additional resources to check out as you craft your partner agreement:

- **Coalitions Work!** Tools, surveys, and guidance to help you develop and run healthy coalitions: http://coalitionswork.com/resources

- **Developing Cooperative Efforts**: Three Essential Elements for Effective Participation (available on the RE-AMP Commons) by Institute for Conservation Leadership

- **M+R**: Rules of Engagement: Operating Guidelines for Coalitions: http://www.powerprism.org/TCC-RulesEngagementWorksheet.pdf

- **Facilitators Guide to Participatory Decision-Making**, by Sam Kaner. Jossey Bass, 2007.