

Scope of Work & Collaboration Agreement Templates

This combined Scope of Work (SOW) - Collaboration Agreement template is intended to support strong communication from the outset for community-engaged research (CER) teams and community-engaged teaching partnerships. The aim is to offer all community-academic teams a framework for the important conversations that anchor a mutually beneficial relationship.

Research Teams: For all CER teams, it will be very helpful to use this template in concert with the SCoRE [CER Principles](#). As you see below, this template supports transparency between you and your partner: recognize that even the most robust partnerships have their limits. It would be virtually impossible for faculty and partners to deeply and authentically understand and operationalize every one of the CER Principles. So don't be overwhelmed! Rather, think of your collaboration as a journey, and take one step at a time. If the researchers can only commit to 3 or 4 principles as they are articulated; the partners can then determine which principles they can own as their commitment.

Educational Teams/Course-Based Partnerships: The Scope of Work template is a useful guide for faculty members who are initiating a partnership for a course they are teaching or will teach. Using the SOW template in conjunction with the Collaboration Agreement will create a truly strong foundation for success. The Collaboration Agreement invites faculty, students, and partners to have a detailed, relationship-building conversation; it covers issues such as IP, which are critical to establishing clarity around right away. In cases where several teams in one course are working with a partner, it's advisable to have each student team complete a collaboration agreement (template included as pages 3-6 of this document).

Want help? Have questions? Contact Ruthie Yow at SCoRE: ruth.yow@gatech.edu.

Course (name, school, number, and link to syllabus if applicable) or Project:

Semester/Year:

Faculty Member (name, email, cell):

Partner (organization with website link, lead name, email cell):

Advancing Long-term Goals: *Complete this section if you are working with an ongoing course (such as a VIP) or with a long-term SCoRE partner and want to situate this project to advance a long-term partnership goals that is mutually beneficial. Discuss how the partner has been working with the faculty member, research project, or course/s to date and how this project will advance the partnership in ways that are mutually beneficial.*

Brief Project Description: *Include link to RFP or FOA if applicable.*

Project Goals or Relevant Learning Outcomes:

Anticipated Deliverables:

Principles Commitment [include link] – FACULTY: *Include # of Principle and 1 sentence example of how it can be honored in this project.*

Principles Commitment [include link] – PARTNERS: *Include # of Principle and 1 sentence example of how it can be honored in this project.*

Timeline, Partner Roles, and Partner Time Commitments: *Describe how and when the partner will be expected to work with you / your team, and on what. If there are important dates/activities for the partner to engage in, include those here.*

Staying Safe – especially for course collaborations: If there are undergraduate students who will be conducting some of their project work related in the community, off-campus – which we encourage! – complete the Contact Information & Off-campus Safety Tips document (also accessible via SCoRE’s Partnership Resources webpage) with the partner and give the students a copy as they get started planning the project. At the end of the Collaboration Agreement template, below, they are instructed to review this document and discuss it with their partner.

SCoRE Collaboration Agreement:
Establishing Shared Understandings with Your Partner

This **Collaboration Agreement**, which begins with a guided conversation, is intended to be filled out by teams – composed of faculty only or faculty *and* students - with their community partner. It serves as a resource to support your partnership building. We strongly recommend you take the time to lay the groundwork of shared understandings through this conversation guide. Please read the whole document in advance of meeting with your collaborator/s.

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SECTION 1: Guided Conversation

This is a relationship building process, not just paperwork—so begin with a conversation that allows you all to talk through hopes, expectations, and goals.

- Make time! At least one hour—and try to go *to* your partner rather than vice versa.
- Get to know each other’s goals and values by sharing experiences and relevant documents (collateral, mission statements, past research collaborations, syllabi, etc.) with each other.
- Use the questions provided as a jumping off point to stimulate a conversation that covers all the bases in terms of communication, deliverables, and timeline, but also allows all participants to offer insight into past partnerships and perspectives on reciprocity and mutual benefit.

OPENING: *Let’s talk about why we are here and what we hope to accomplish together.¹*

1. **Observe.** Review the scope of work above and any other materials you have shared or brought with you. Then go around the table and have each person state one thing they are interested in or excited about regarding this project.
 - a. Where do we have common interests and overlap?
 - b. What are some areas of different interests and goals? (no need to solve them – just get them on the table as observation)

2. **Reflect.** Have 2-3 people share a bit about a past collaborative experience (of any kind).
 - a. What worked well in past collaborations? What didn’t?
 - b. What principles have been most central to fruitful work in past collaborations?
 - c. How might we reproduce the good aspects of those relationships?

¹ This conversation guide is adapted from The Institute of Cultural Affairs “Guided Conversations,” available online via SCoRE [here](#).

3. Interpret. Listening to each others' observations and reflections, consider what the goals of and expectations for the collaboration should be.
 - a. Why are we doing this project/working together?
 - b. What do the students need/hope to achieve?
 - c. What does the partner need/hope to achieve?
 - d. What specifically constitutes our shared vision for working together?
 - e. What else, beyond a concrete deliverable, do we expect from this collaboration?

4. Decide. As a group, you will now complete the Collaboration Agreement below.
 - a. What are 2-3 key points from our conversation(s) so far that we want to make sure to address in that agreement?
 - b. What are other specific ways for us to engage with the community represented in this project?

CLOSING: *Let's take a look at the Agreement below and, using our conversation and notes, complete it to suit our collaboration. This will help us establish parameters and goals—both in terms of logistics and values—that are feasible, clear, and mutually acceptable.*

SECTION 2: Collaboration Agreement - An Agreement on How to Work Together

This agreement reflects our previous conversation/s and is intended to facilitate a smooth and fruitful path forward; it is in no way legally binding. It is, however, a demonstration that we have listened to each other and laid a foundation for reciprocity, joint decision-making, and continuous communication.

Project Description, Goals, and Deliverables: Look back at the Project Description, Goals, and Anticipated Deliverables included in the Scope of Work at the beginning of this document. Read these out loud, together. Is everyone comfortable with them? Or – now that some time has passed since they were first written, and also you have had some more discussion – do you want to make some changes? Revise them until everyone is comfortable with them.

Project Description: Use above or revise?

If revise – write final description together, here:

Project Goals: Use above or revise?

If revise – write final goals together, here:

Project Deliverables: Use above or revise?

If revise – write final deliverables together, here:

Now - come up with a **Project Title** together and write it here:

Communication:

1. Who are the primary points of contact? Include name and information to get in touch (cell phone number, email, etc.).

Georgia Tech Student Team/ GT Faculty Member/Other Lead:

Partner:

2. Discuss and note down basic communication expectations. How quickly should we all be expected to respond? How early/late is it okay to call? And anything else you want to go over.

3. What will we do if we experience conflict? E.g., if we are not getting responses or if we are not feeling comfortable with how the project is proceeding? Discuss and note down mutually suitable parameters re: how we will address these types of conflicts if they arise. *Note that if major conflicts arise, students, faculty, and partners should all feel free to contact SCoRE for help with mediation (sooner rather than later, please).*

Intellectual Property/Product Ownership: Intellectual Property (IP) is defined as “the creative product of the mind,” and its exclusive right to use by the developer may be legally protected. GT’s broad policy is that students hold any IP they create, so you will want to carefully articulate what the IP agreement for the course project is – if IP is relevant.

Is IP relevant to our project? Yes/No

Explain your answer:

If yes – what is our consensus on intellectual property?

___ Students will cede IP to the partner.

___ Students will retain the IP.

___ We have a separate IP agreement or understanding already in place that governs our course or department’s projects (example: CS Junior Capstone).

Work Plan/Timeline:

Project Start Date:

Project End Date (all deliverables complete):

Establish regular meetings and check-ins:

- Will you check in with each other weekly? Bi-weekly? Monthly?
- What day of the week? What time? For how long?

- In-person? Virtually? By phone?
- Will you check in with each other in between meetings? If so – when and how? Discuss and note here:

Establish at least 1 initial milestone for each deliverable above:

Deliverable	Milestone	Date

Sign and Date

Everyone involved should sign and date here. Then make sure that everyone receives an electronic copy of this full document.

Name Date

Name Date

Name Date

Name Date
