



## Memorandum of Partnership

Strategic Doing is a discipline that enables networks of people to work together for the greater good. As practitioners of the discipline, we agree on several foundational principles for our work:

- We believe we have a responsibility to build a prosperous, sustainable future for ourselves and future generations.
- No individual, organization, or place can build that future alone.
- Open, honest, focused and caring collaboration among diverse participants is the path to accomplishing clear, valuable, shared outcomes.
- We believe in doing, not just talking – and in behavior in alignment with our beliefs.

(Strategic Doing “credo,” adopted 2011)

In this spirit, this memorandum of partnership between the Strategic Doing Institute and the (affiliate name) Strategic Doing affiliate describes the relationship, rights, and responsibilities of both parties.

### The Strategic Doing Institute:

- Grants to the affiliate the right to provide certification and re-certification training to Strategic Doing workshop leaders, when training is conducted by certified Strategic Doing faculty.
- Grants to the affiliate the right to use the Strategic Doing logo and affiliate “badge” without alteration.
- Will support the affiliate. This support will include provision of up to 10 hours of free coaching annually, by arrangement with the SDI.
- Will provide access to the affiliate area of the SDI website.
- Will treat all affiliates equitably.
- Will maintain a web presence for affiliates that includes a detailed description of each affiliate’s experience and qualifications. As the entity that currently receives most requests, the Purdue Agile Strategy Lab will refer people looking for assistance to the website if they are unable to respond to the request.
- Will not approve new affiliates at the expense of the existing affiliates. In the case of an application for affiliate status from the same region as an existing affiliate, the SDI will convene a conversation with the existing affiliate to ensure that there is no threat of “cannibalizing” their work.

(revision date: 9/26/16)

- Will oversee the quality of Strategic Doing work done by affiliates. Should a concern that the affiliate’s practice of the discipline is not of high quality arise, the SDI may enter into an “improvement plan” with the affiliate or with individual faculty, and if needed may revoke faculty certification or affiliate status.

**(affiliate name):**

- Will ensure that it has at least three certified faculty. The faculty need not be employees of (affiliate). Faculty who leave or retire from the affiliate institution may, at the affiliate’s discretion, be retained as Strategic Doing faculty of the affiliate. If the number of faculty falls below three, the affiliate has a responsibility to make sure another faculty is brought on board by the time of the next annual renewal (see “Financial Considerations”).

Names of Strategic Doing certified faculty (or faculty candidates) as of the date of this memorandum:

(name)

(name)

(name)

- Will ensure that the Strategic Doing practice undertaken is of consistently high quality. The affiliate’s faculty will participate in ongoing evaluation and a guided self-reflection practice to ensure this quality.
- Will ensure that the SDI receives information about events held and individuals trained (including names, organizational affiliations, and emails) no later than 30 days after each event.
- Has the right to determine certain other issues in their deployment of the Strategic Doing discipline, including: fees for work, how faculty are assigned to projects, and whether faculty may take on strategic doing work as consultants (rather than as employees).
- May, with the approval of the SDI, invite a neighboring institution into a shared affiliate arrangement.

Financial Considerations:

(affiliate name) will pay an annual affiliate fee of \$5,000 to the SDI. The affiliate fee will be invoiced by the SDI twelve months after approval of the affiliate (and each year thereafter) and is due no later than 30 days thereafter (affiliates may request that the date of invoicing be moved up to better match institutional calendars).

Invoices for the affiliate fee will be sent to:

(name, title, email)

In addition, the affiliate will have exclusive access to some training materials through the SDI website store, at a cost equal to the cost of production.

Both parties acknowledge that the structure of the program may need to be adjusted based on experience in the field. Any such modification will be undertaken only in discussion with affiliates.

Signatures

For the Strategic Doing Institute:

(name)

(title)

(date)

For (affiliate):

(name)

(title)

(date)