LETTER OF AGREEMENT:
CREATING CLARITY & ACCOUNTABILITY
FOR EXTERNAL TALENT

Vantage Point believes strong organizations begin with effective governance, management and planning.

By providing cutting edge learning opportunities and resources for not-for-profit leaders, we work with you to seek a more effective way to achieve your mission. Always with a focus on people first. Because people, more than money, are the key to creating the change our communities require.

Vantage Point offers a transformational model of people engagement – a more successful and sustainable way for you to do business. We work with you to attract and engage unlimited talent by building personalized structures and cultures that value people. This toolkit outlines what information to include in a Volunteer Letter of Agreement.

You've completed the volunteer recruitment process, and found the right volunteer with the right skills - *now what?* A letter of agreement ensures both you and the volunteer clearly understand and agree on the project's end goal, expected deliverables and time commitment. It is important any letter of agreement is reciprocal; outlining commitments and deliverables for **both** parties. Use of this tool will improve project execution by providing a formalized process to discuss expectations and accountability.

In this toolkit you'll find a Volunteer Letter of Agreement template as well as two samples of a Vantage Point Letters of Agreement we've recently created for actual roles on our external talent team.

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VOLUNTEER LETTER OF AGREEMENT TEMPLATE:

[YOUR LOGO]

Letter of Agreement

Between **[Your Organization]** and
[Name of Volunteer, Role Title]

[Date:]

This form constitutes an agreement between **[Your Organization]** and **[Name of Volunteer]** for the services described in the included deliverables. The terms and conditions as set out herein are not subject to any other written or verbal condition, qualification or agreement.

Term:

The term of the agreement shall be from **[project start date]** to **[project end date]** for an estimated **[number]** hours of work, executed in person, via telephonic and electronic consultations and independently. The end date of the agreement is subject to flexibility, with two weeks' notice.

Talent Deliverables:

[Name of Volunteer] will be responsible to **[Your Organization]** for deliverables as outlined originally in the Position Description or Terms of Reference. These deliverables include:

- Include the deliverables from the original role description if you created one. You will also have other, more specific deliverables and timelines that are appropriate to add here.
- Be very specific about the tangible outputs you expect and list them individually.
- Think about this as project planning – outline the steps required for the volunteer to successfully complete the project/role.
- What other specific tasks with deadlines are there that may not be in the project plan? Program or organization documents to review for background? Meetings to attend? Reporting requirements? Specifics give volunteers clarity, just as a clear job description gives your staff clarity to successfully execute their role.

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[Your Organization] Deliverables:

[Your Organization] will be responsible to **[Name of Volunteer]** for deliverables as outlined in the Terms of Reference and as required to enable the project's activities. Additionally, **[Your Organization]** will provide:

- A primary contact: **[Name of Salaried Staff and Position]**
- Timely response to questions and requests and access to appropriate information
- Feedback on performance and deliverables
- Awareness of **[Name of Volunteer]** learning objectives and efforts to meet those objectives
- **[Add any other specific deliverables you have agreed to such as a training session]**

Reporting:

[Name of Volunteer] is accountable to **[Name of Salaried Staff and Position]**.

What will you receive?

By collaborating with **[Your Organization]** you have the:

- Opportunity to invest in your community
- Capability to contribute to building strong leaders and organizations
- Opportunity to become a Knowledge Philanthropist
- Ability *to* inspire and in return *be* inspired
- Opportunity to move organizations forward

Compensation:

Upon completion of the agreed deliverables and at your request, **[Your Organization]** will provide a reference or letter of recommendation based on the work completed. **[Add in any further agreements you have made i.e, graphic credit, free workshop, networking opportunities, etc.]**

Expenses:

[Your Organization] will pay reasonable expenses, upon submission of receipts and with the prior approval of the **[Name of Salaried Staff and Position]**.

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Liability/Insurance:

[Your Organization] will be responsible for all insurance and liability coverage required for the project.

Ownership:

The copyright of any reports/products developed for **[Your Organization]** relating to the deliverables during this agreement will belong to **[Your Organization]** exclusively.

Confidentiality:

It is expected that **[Name of Volunteer]** will not divulge any confidential information concerning **[Your Organization]** or its dealings with individuals or organizations. **[Name of Volunteer]** will review and abide by the *Privacy Policy Statement* and *Confidentiality* portions of the *Volunteer Handbook.*

Termination:

This agreement may be terminated with **[days/weeks/months]** written notice, by either party. In the case of early termination, **[Your Organization]** will provide **[Name of Volunteer]** with appropriate feedback on the quality of performance to that date.

This agreement carries with it no commitment respecting continuation of services beyond the specified term.

_____ _____

[Name of Signing Authority and Position] **Date**

[Your Organization]

_____ _____

[Name of Volunteer] **Date**

[Name of Volunteer Role]

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VOLUNTEER LETTER OF AGREEMENT SAMPLE 1:

Letter of Agreement

Between **Vantage Point** and
John Doe, *Graphic Designer – Learning Materials*

Date: August 1, 2012

This form constitutes an agreement between **Vantage Point** and **John Doe** for the services described in the included deliverables. The terms and conditions as set out herein are not subject to any other written or verbal condition, qualification or agreement.

Term:

The term of the agreement shall be from July 19, 2012 to approximately September 30, 2012 for an estimated 20 hours of work, executed in person, via telephonic and electronic consultations and independently. The end date of the contract is subject to flexibility, with two weeks' notice.

Talent Deliverables:

John Doe will be responsible to **Vantage Point** for deliverables as referenced in the **Graphic Designer – Learning Materials** Description (see position description). These deliverables include:

- Power Point, Workbook & Toolkit concept (as proposed by designer)
- Final template design for Power Point, workbooks (approx 5 pages) and the toolkits (1-2 pages) using already developed content
- Source any images required (Vantage Point will manage the rights/permissions for those images)
- Work with Vantage Point to determine the best format/software for ensuring the ability to edit the templates post-design and provide all final design files to Vantage Point

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Vantage Point Deliverables:

Vantage Point will be responsible to **John Doe** for deliverables as required to enable the project's activities. These deliverables include:

- Ability to include final product in your portfolio of work and design credit where appropriate
- A primary contact: Annastasia Palubiski, Director of Communications and People Engagement.
- Timely response to questions and requests and access to appropriate information.
- Feedback on performance and deliverables.
- Awareness of contractor's learning objectives and efforts to meet those objectives.

Reporting:

John Doe is accountable to Annastasia Palubiski, Director of Communications and People Engagement.

What will you receive?

By collaborating with **Vantage Point** you have the:

- Opportunity to learn content in governance and not-for-profit management
- Opportunity to expand your networks and connections in the community
- Opportunity to invest in your community
- Capability to contribute to building strong leaders and organizations
- Ability *to* inspire and *be* inspired

Compensation:

Upon completion of the agreed deliverables and at your request, **Vantage Point** will provide a reference or letter of recommendation based on the work completed.

Expenses:

Vantage Point will pay reasonable expenses, upon submission of receipts and with the prior approval of Annastasia Palubiski, Director of Communications and People Engagement**.**

Liability/Insurance:

Vantage Point will be responsible for all insurance and liability coverage needed for the project.

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Ownership:

The copyright of any reports/products developed for **Vantage Point** relating to the deliverables during this agreement will belong to **Vantage Point** exclusively.

Confidentiality:

It is expected that **John Doe** will not divulge any confidential information concerning **Vantage Point** or its dealings with individuals or organizations. **John Doe** will review and abide by the *Privacy Policy Statement* and *Confidentiality* portions of the *Volunteer Handbook.*

Termination:

This agreement may be terminated with two (2) weeks written notice, by either party. In the case of early termination, **Vantage Point** will provide **John Doe** with appropriate feedback on the quality of performance to that date.

This agreement carries with it no commitment respecting continuation of services beyond the specified term.

_____ _____

Colleen Kelly, **Date**
Executive Director, Vantage Point

_____ _____

John Doe, **Date**
Graphic Designer – Learning Materials

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VOLUNTEER LETTER OF AGREEMENT SAMPLE 2:

Letter of Agreement

Between **Vantage Point** and
Jane Doe, *Photographer*

Date: April 30, 2012

This form constitutes an agreement between **Vantage Point** and **Jane Doe** for the services described in the included deliverables. The terms and conditions as set out herein are not subject to any other written or verbal condition, qualification or agreement.

Term:

The term of the agreement shall be from March 2, 2012 to April 30, 2012 for an estimated 20 hours of work executed in person (photo shoots) and independently (editing at home), with some telephone and electronic consultations. The end date of the contract is subject to flexibility, with two weeks' notice.

Talent Deliverables:

Jane Doe will be responsible to **Vantage Point** for deliverables as referenced in the **Photographer** Description (see position description). These deliverables include:

- Understand the culture and brand of Vantage Point
- Make recommendations on how to structure the photo shoots (formal? informal? Staged scenes?)
- Capture a variety of images to create a photo bank for varied usage
- Conduct any necessary edits to the photographs
- Produce 24 final photos and provide files in formats ready for publication online, in Power Point and print materials
- Provide approx. 75 un-edited files of the raw shots.

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Vantage Point Deliverables:

Vantage Point will be responsible to **Jane Doe** for deliverables as outlined in the Terms of Reference and as required to enable the project's activities. Additionally, **Vantage Point** will provide:

- Scheduling of all models and locations for the photo shoots
- Signed release forms from all models giving consent to having their photo used publicly in print and on the web to represent Vantage Point
- Props
- Archiving raw and final photographs
- Photo credit to **Jane Doe** wherever the photos are used, when possible
- A primary contact
- Timely response to questions and requests and access to appropriate information.
- Feedback on performance and deliverables.
- Awareness of **Jane Doe's** learning objectives and efforts to meet those objectives.

Reporting:

Jane Doe is accountable to Annastasia Palubiski, Director Communications and People Engagement.

What will you receive?

By collaborating with **Vantage Point** you have the:

- Opportunity to expand your networks and connections in the community
- Opportunity to invest in your community
- Ability *to* inspire and *be* inspired

Compensation:

Upon completion of the agreed deliverables, **Vantage Point** will provide a letter of recommendation and/or act as a reference as appropriate.

Expenses:

Vantage Point will pay reasonable expenses, upon submission of receipts and with the prior approval of the Director Communications and People Engagement.

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Liability/Insurance:

Vantage Point will be responsible for all insurance and liability coverage needed for the project.

Ownership:

Jane Doe will own the artistic credit for all photographs produced and rights to use in her professional portfolio. Photo credit will be given by **Vantage Point** to **Jane Doe** wherever the photos are used, when possible. **Vantage Point** will own the copyright for all photographs produced for **Vantage Point** relating to the deliverables during this agreement.

Confidentiality:

It is expected that **Jane Doe** will not divulge any confidential information concerning **Vantage Point** or its dealings with individuals or organizations. **Jane Doe** will review and abide by the *Privacy Policy Statement* and *Confidentiality* portions of the *Volunteer Handbook.*

Termination:

This agreement may be terminated with two (2) weeks written notice, by either party. In the case of early termination, **Vantage Point** will provide **Jane Doe** with appropriate feedback on the quality of performance to that date.

This agreement carries with it no commitment respecting continuation of services beyond the specified term.

_____ _____

Colleen Kelly,
Executive Director, Vantage Point

Date

_____ _____

Jane Doe, Photographer

Date

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We welcome your feedback!

If you enjoyed this resource, we invite you to engage with Vantage Point and learn more about our programs and services:

- Visit our Resource Centre for more board development and volunteer engagement resources.
- Experience these tools in action by attending one of our Learning Opportunities.
- Subscribe to our blog to receive thought-provoking content related to the not-for-profit sector.

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