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EDGEWATER



EDGEWATER MEDIATION GROUP

TOOLKIT SERIES · NO. 06



Agreement Design Worksheet

Get clear before assumptions become conflict.

CLARITY · CHOICE · RESOLUTION

EDGEWATER MEDIATION GROUP LLC

Agreement Design Worksheet

Get clear before assumptions become conflict.

This resource is provided by Edgewater Mediation Group LLC for general educational and conflict-resolution purposes. Edgewater Mediation Group is not a law firm and does not provide legal advice. Information contained in this resource should not be considered legal advice for any individual situation.

Use this worksheet to intentionally structure any ongoing arrangement — roommates, business partners, family arrangements, shared projects, caregiving, organizations, teams, or other ongoing relationships.

01

Who

Who is involved?

02

Purpose

Why are we entering this arrangement?

03

Expectations

What does each person expect?

04

Responsibilities

PERSON	RESPONSIBILITY	FREQUENCY / DEADLINE

05

Money

Who pays for what? _____

When? _____

How? _____

06

Decision-Making

Individuals Can Decide

Requires Group Agreement

07

Communication

How will important information be communicated?

e

EDGEWATER COACHING NOTE

Naming the method of communication now — a call, a shared document, a weekly check-in — prevents “I told you” disputes later.

08 Boundaries

What boundaries or limitations should everyone understand?

09 Changes

How can the arrangement be changed?

10 Problems

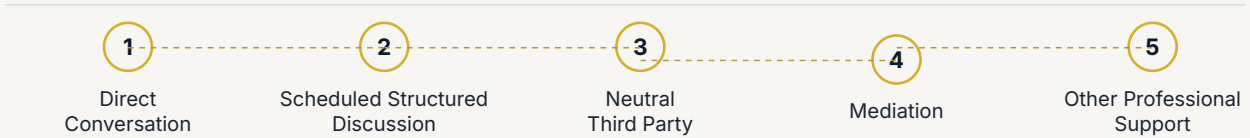
What happens if someone cannot fulfill their responsibility?

 EDGEWATER COACHING NOTE

The strongest agreements plan for the ordinary bumps, not just the ideal scenario. This section is where that resilience lives.

11

Disagreements



12

Exit

How can someone leave the arrangement?

13

Notice

How much notice should be given?

14 **Property / Money**

How are shared property or funds handled when the arrangement ends?

15 **Review Date**

When will we revisit this arrangement?

16 **Formal Documents**

What aspects may require a formal contract or legal agreement?

17 **Final Summary**

Our most important expectations are:

This resource is designed to help structure conversations and planning. It does not create a legal contract or guarantee legal enforceability. Consider consulting a licensed attorney when creating legally binding obligations.