

TOOLKIT #8

Negotiate on Interests

A preparation sheet for partnerships, donor agreements and internal conflicts. Look past positions, invent options and agree on fair standards.

A Lever & Core toolkit

Based on principled negotiation · Roger Fisher & William Ury, Getting to Yes

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Every complex organization is inherently simple.

01 · WHAT IT IS

Stop arguing over positions. Start solving for interests.

Most negotiations stall because each side defends a position: a fixed demand like “our logo goes first” or “no overhead in this grant”. Behind every position are interests, the needs and worries that made someone take it. Positions usually collide. Interests often don’t.

What it is

A way to prepare for any negotiation by mapping both sides’ interests, inventing options that serve them, and choosing between those options with standards neither side controls. Nobody has to “give in”, because the decision rests on something both can defend.

This toolkit turns that approach into a one-hour preparation routine and one worksheet you can take into the meeting.

What you need

45–60 minutes before the meeting, one to three people from your side, the worksheet on page 6, and whatever you know about the other side’s situation.

Source method. Principled negotiation was developed at the Harvard Negotiation Project by Roger Fisher and William Ury, and presented in their book *Getting to Yes* (first published 1981; later editions with Bruce Patton). This toolkit is Lever & Core’s own adaptation for mission-driven organizations.

Use it when

- You are shaping a **partnership or joint program** with another organization.
- A **donor or funder** attaches conditions you can’t accept as they stand.
- You are renewing a **contract** with a municipality, venue or supplier.
- Two **departments** compete for the same budget, staff or calendar.
- A **team conflict** over roles or workload keeps coming back.

Be careful when the other side is acting in bad faith, a legal or safeguarding issue is involved, or the power gap is very large. Prepare the same way, but bring in your board or legal counsel early and lean hard on your alternative to a deal.

Before

Map interests, options, criteria and your alternative on one page. Most of the work happens here.

During

Ask before you propose. Listen for the reasons behind demands and steer every disagreement toward a fair standard.

After

Write down what was agreed, check it against your must-haves, and keep the relationship warm.

02 · THE FRAMEWORK

Four elements and one floor

WHAT YOU HEAR VS. WHAT DRIVES IT

ABOVE THE SURFACE

Position

what they say they want

BELOW THE SURFACE

Interests

why they want it

- Needs
- Worries and risks
- Hopes and ambitions
- Constraints they answer to

1 People

Separate the relationship from the problem. Soft on people, firm on the issue.

2 Interests

Ask “why?” and “why not?” until you reach what really matters to each side.

3 Options

Invent several possible deals before judging any of them. Trade what is cheap for you and valuable to them.

4 Criteria

Decide with fair standards both sides can defend: precedent, market rates, policy, expert input, a fair procedure.

BATNA — **Best Alternative To a Negotiated Agreement**

What you will do if there is no deal. It is the floor under the whole conversation: never accept less than it.

Positions vs. interests: a quick test

POSITION “Our logo goes first on everything.”

Possible interest: their board needs visible proof that its support matters.

POSITION “We won’t fund overhead.”

Possible interest: they fear money disappearing into unclear admin costs.

POSITION “My team can’t take this project.”

Possible interest: the team is already stretched and was never consulted.

Why the BATNA matters

Without a clear alternative you may accept a deal that is worse than walking away, or reject one that was better than anything else on offer.

Knowing your BATNA, and working to **improve it before you meet**, is your real source of strength. It matters far more than how loudly you argue.

Estimate theirs too

What happens to the other side if there is no deal? The weaker their alternatives, the more room you have to ask for what you need, and the more carefully you should protect the relationship.