



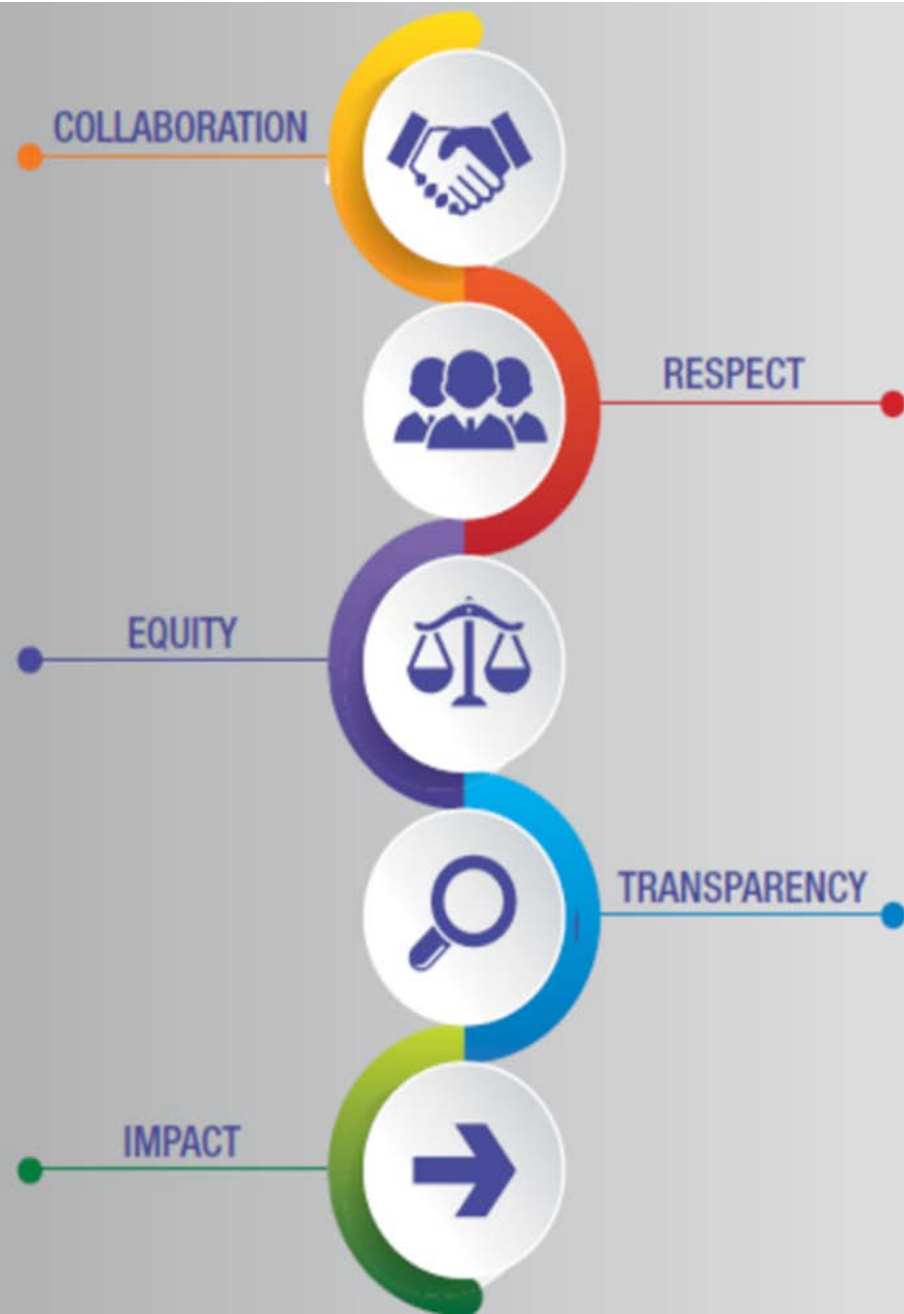
Documenting Partnership Roles & Agreements: MOUs & Other Tools

This document provides guidance for research partnerships on how to discuss and document agreements about partnership roles, structures, and process.

Related Directory Resources: [MOU Samples](#) & [MOU Sample w Community Health Center](#)



Principles of Engagement



Community-Engaged Research

- Bidirectional exchange of expertise between academics (scientific experts) & communities (local, cultural, practice experts) resulting in informed decision-making about design/conduct/use of research
- **Broad spectrum:** minimal to equal partnership in all aspects

Steps for Building & Sustaining Healthy Partnerships

- **Reflecting internally before engaging**
- Finding & engaging right partners
- Building trust/relationship
- **Discussing & agreeing on how to work together**
- **Documenting those agreements**
- Continual attention to relationships & updating agreements as necessary



Reflection BEFORE & during engagement



Faculty engagement vs institutional engagement

Individual community contact vs organizational engagement



Engaging partners & building partnership

- The “right” partners- Related resource:
Identifying & Engaging Community Stakeholders
- Moving from partners to partnership- not just individuals working together but a group collaboration
- Building trust- this step is never done

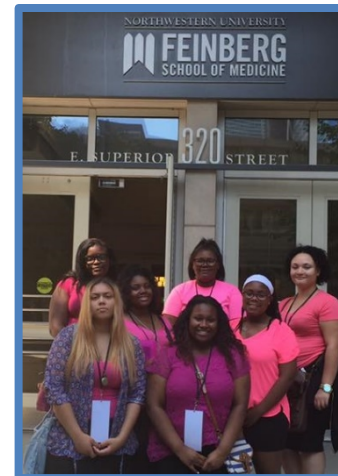


Partnership mindset

- Sounds nice in theory but... there are risks involved
 - May lead to change in dynamics & relationships between people, organizations (e.g. new reporting hierarchy)
 - Orgs may have different standards, procedures, protocols
- Working together means...
 - Moving from 'turf' to shared mutually beneficial space
 - What's mine is all of ours
 - Step up/step back
 - Compromise

Discussing & Agreeing how to collaborate

- **Discussion is more important than agreement.**
- Allow time, in person. As early as possible
- Can look to examples from other partnerships but **PROCESS** of discussion for your specific partnership is key.



Items to discuss

- Individual and shared agendas/top priorities- conflicts of interest
- Clear Goals & Objectives and Roles & responsibilities- what if work isn't getting done, requirements/funder deliverables
- Communication, rules of engagement- equal partnership or lead & subcontractor/consultant
- How decisions will be made- who will be involved in discussion? who will be consulted? who will make final decisions? Who will be informed of decisions?
- Data ownership & future uses- intellectual property
- Dissemination of results/media- authorship, who can speak on behalf of partnership/project?
- Finances
- Handling conflict



Plan for conflict *before it happens*

- Conflict evokes emotion. Easier to discuss/plan in the abstract before it's real & people are hot under the collar.
- Prevention is the best approach. Communication is the best prevention. If these things below arise, what should our partnership do?
 - Money (budget cut)
 - History, politics, turf issues
 - Unexpected or negative results
 - Poor or too little communication
 - Differing expectations/assumptions/priorities
 - Interpersonal conflict/clashing organizational cultures
 - Commitment imbalances or unequal work loads
 - Institutional rules & regs
 - Partner/staff turnover
 - Discriminatory “isms”
 - Power imbalances



Documenting agreements

- As much or as little
- As formal or as casual
- Written is important: MOU/MOA/LOA, contract, invoice
- Who signs?
- Who is the agreement between- individuals? Organizations? Institutions?



Change happens, plan for it

- Not only when there's a problem
- From the beginning
- Checking in
- Updating- modification, termination
- Celebrating



What if conflict arises...

- Go back to your shared vision
- Go back to written agreements
- Address together, as partnership- shared problem, shared solution
- Assume there is legitimate reason
- Take time to resolve it: Reach out, be willing to talk
- Be transparent
- Attack the problem, not the person
- Strategies from other partnerships. Assistance from neutral party
- Agree to disagree, agree to dissolve

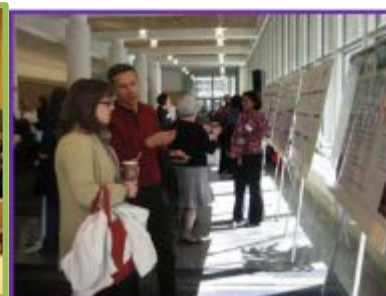


Alliance for Research in Chicagoland Communities



Celebrating 10 years of engagement and action

Mission: to catalyze and support meaningful community and academic engagement across the research spectrum to improve health and health equity



Northwestern University Feinberg School of Medicine

Center for
Community Health

Northwestern University Feinberg School of Medicine

Institute for
Public Health & Medicine

Northwestern University

NUCATS
Clinical and Translational Sciences Institute



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<http://www.feinberg.northwestern.edu/sites/cch/>



National Resources



**Community-Campus
Partnerships for Health**

Promoting Health Equity and Social Justice

www.ccphealth.org

- Patient & Family Engagement Rubric
- Sample Patient Engagement Plans



<http://www.pcori.org/funding-opportunities/what-we-mean-engagement>



Community-Based Public Health Caucus



Journal

