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][1] & [MOU Sample w Community Health Center][2]
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
www.ARCConline.net

Jen Brown: jenbrown@northwestern.edu

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

APHA
AMERICAN PUBLIC HEALTH ASSOCIATION
For science. For action. For health.

CBPH

Journal

PCHP
Progress in Community Health Partnerships: Research, Education, and Action