

Partnership Agreements

Best Practices and Tools to Develop Partnership Agreements

Introduction

A partnership agreement is a tool used to describe how stakeholders work together to support implementation. Similar to a team charter, partnership agreements identify the intended results and scope of work for the engagement, what each partner will contribute, and how the partners will work together. These agreements are most effective when they are co-created among partners and reflect shared commitment and accountability.

What Are Partnership Agreements

Partnership agreements are typically formed when multiple partners are coming together to support implementation of an intervention or practice. Partners are groups of individuals who collaborate to align their contributions toward achieving a shared result or to support implementation of a new endeavor and share in decision making.¹ This can occur when partners are selecting or developing something new or preparing to replicate or adapt an effective intervention or practice. For example, the process of developing a partnership agreement and related tools can be used when a new program is in the early stages of implementation and multiple partners — including developers, technical assistance experts, funders, community providers, community partners, individuals and families — are coordinating implementation efforts. Development of partnership agreements most often occurs in the exploration or installation stage of implementation. Refining or redeveloping partnership agreements can also happen further into implementation when new partnerships are formed or there is a reason to revisit partner roles.

What Are Best Practices for Developing a Partnership Agreement?

Implementation support practitioners may engage in the process and best practices below when developing a partnership agreement:

- **Develop a shared understanding.** First, develop a shared understanding among partners about the intended results, benefits and expectations of working together. During this process, partners can learn together as they share their own organizational culture and context, the experience and expertise they will contribute to the effort and what they hope to achieve as a result. It may also help partners to identify or acknowledge any potential challenges that could impede implementation and require effort on behalf of the partnership. For example, administration changes, elections or funding limitations are known challenges that the partnership could identify and plan for. Collaborative efforts often marry

stakeholders with different values, organizational cultures and ways of work; in such partnerships, stakeholders may perceive threat or loss if they participate in a collective way of work.² Ask questions to help partners build trust by encouraging them to listen to each other for the purpose of mutual understanding. Address power imbalances between partners by building trust, supporting authentic two-way communication and cultivating opportunities for mutual consultation and accountability.³

- **Co-design the partnership agreement.** Next, support partners in drafting their agreement through an iterative process that promotes shared understanding. This can be led by the implementation support practitioner or one of the partners. As the agreement is drafted, help partners develop an evolving collective view or shared understanding, rather than pushing for consensus, which can be artificial or perpetuate power structures.⁴ The agreement should include the following:
 - intended results for the partnership;
 - benefits each partner will receive as part of participation;
 - contributions from each partner to the partnership and implementation effort, including specific responsibilities; and
 - ways partners will work together, including how they will make decisions and hold one another accountable.

Typically, the lead partner or facilitator can create a first draft of the agreement with as much of the content as possible based on the initial conversation. The draft can include comments or questions for all partners to discuss.

- **Vet the partnership agreement.** Once the initial partnership agreement is drafted, partners meet to refine the agreement through facilitated discussion of each of the partnership sections. Vetting the partnership agreement together supports collective sense-making, negotiations, shared understanding and the development of mutual accountability for the intended results. When the partners decide the agreement is good enough to begin work together, they can choose to sign it or share it with others in their organizations and systems.
- **Use and reflect on the partnership agreement.** The partnership agreement is a living document that should be actively used during implementation. It can provide guidance to an implementation plan by specifying partners' roles and be helpful as a touchstone throughout implementation. When partners meet, they can reflect on the agreement to understand how their current work aligns with their intentions. Finally, the agreement should be improved and revised as implementation progresses. Partnerships and ways of work often change over time as roles shift and new processes emerge. The agreement should be updated to reflect these changes.

What Principles and Competencies are Needed to Develop Partnership Agreements?

Implementation support practitioners often engage in activities that support collaboration, discussion and negotiation among partners.⁵ Developing a partnership agreement through a facilitated, co-creative process allows partners to identify and appreciate the expertise, expectations and contributions of each partner and increases buy-in and commitment to the partnership. Specific principles and competencies⁶ relevant to developing partnership agreements are described below.

Principles

Principles guide and underpin implementation support practitioners' work.

- **Be empathetic:** Regard all stakeholders as respected and valued contributors
- **Advance equity:** Integrate equity components into the partnership agreement
- **Use critical thinking:** Explore assumptions
- **Embrace cross-disciplinary approaches:** Empower different ways of knowing

Competencies

Competencies are the necessary knowledge, resources and skills for the implementation support practitioners' work.

- **Broker:** Connect partners by providing advice and serving as a resource
- **Address power differentials:** Use facilitation to make power structures visible
- **Co-design:** Work with partners to collaborate in developing the agreement
- **Grow and sustain relationships:** Have difficult conversations with partners
- **Facilitation:** Enable mutual understanding among partners
- **Co-learn:** Seek to understand how partners expect to give and receive within the partnership

What Tools or Resources Are Available to Develop Partnership Agreements?

Implementation support practitioners can use the following resources:

1. **Forming Partnership Agreements:** This protocol can be used independently by partners or with a facilitator to develop shared understanding of roles prior to developing a partnership agreement.
2. **Partnership Agreement Template and Examples:** This template can be used to document the key elements of a partnership agreement: intended results, what each partner will contribute and receive, and ways in which partners will work together. Two sample partnership agreements are included.

¹ Pillsbury, J.B. *Theory of aligned contributions: An emerging theory of change primer*. Retrieved March 30, 2020 from <http://www.sherbrookeconsulting.com/products/TOAC.pdf>

² Vargo, S. L., & Lusch, R. F. (2004). Evolving to a New Dominant Logic for Marketing. *Journal of Marketing*, 69(1): 1-17. doi: 10.1509/jmkg.68.1.1.24036

³ Metz, A., Louison, L., Burke, K., Albers, B., & Ward, C. (2020). *Implementation support practitioner profile: Guiding principles and core competencies for implementation practice*. Chapel Hill, NC: National Implementation Research Network, University of North Carolina at Chapel Hill. <https://nirn.fgg.unc.edu/resources/implementation-support-practitioner-profile>

⁴ Metz, A., Louison, L., Burke, K., Albers, B., & Ward, C. (2020).

⁵ Metz, A., Louison, L., Burke, K., Albers, B., & Ward, C. (2020).

⁶ Metz, A., Louison, L., Burke, K., Albers, B., & Ward, C. (2020).