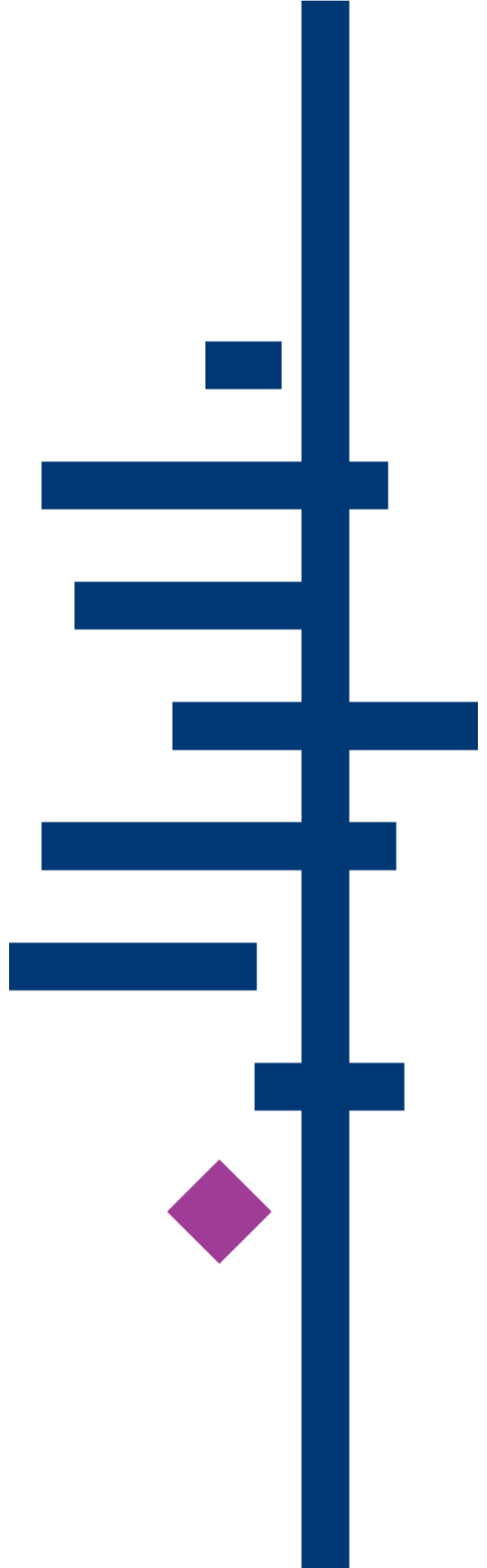


Guidance note for partnership development

Developed by KT Working Group
on Strategic Partnerships
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1 Introduction

Cochrane wants to engage with its users to support evidence informed decision making. Strategic partnerships, at the organizational, regional, national, network and group levels, are therefore essential. These can include partnerships with health practitioners, policy-makers and healthcare managers, researchers, research funders, as well as consumer agencies and organizations.

In its [partnership policy](#), Cochrane defines partnership as: *'A collaborative relationship between two or more parties that have agreed to work together, that is based on trust, equality and mutual understanding, and focuses on the pursuit of common goals that cannot be accomplished by the partners on their own'*.

For all Cochrane Groups the requirements and expectations regarding the establishment of external partnerships are well defined:

- For [Geographically oriented Groups](#), there is a function which includes specific reference to building partnerships with key stakeholders, while some of the other functions would also benefit from partnerships.
- [Cochrane Fields](#), with their emphasis on KT activities, have a history of active engagement with external partners. Network building and stakeholder engagement are described as two key dimensions for Fields.
- [Cochrane Networks](#) are expected to liaise with the CET, Centres and other geographic-oriented Groups, Fields, and others within the Cochrane community to support knowledge translation activities; and to ensure that there is effective joint working across the community, leading to greater engagement with stakeholder communities and increased impact and uptake of Cochrane Reviews.
- For [Cochrane Review Groups](#) engagement with key stakeholders and decisions makers is especially relevant for prioritization of reviews. Engagement during the priority setting process will also facilitate the use of reviews, as these will be more relevant to the needs of various stakeholders.

This guidance note has been developed by the Knowledge Translation Working Group on Formalizing Strategic Partnerships (KT Working Group). This KT Working Group aims to provide practical guidance to Cochrane Review Groups, Geographically-oriented Groups (collectively: Groups), Networks and Fields on strategic partnership development, and thus supports the various Cochrane Groups, Networks and Fields in reaching the expectations outlined above.

This guidance note is a draft for consultation. We welcome any feedback on the guidance and encourage you to share your experiences of your partnership work, so that we can further improve this guidance note. Any feedback can be send to: Karen Head (khead@cochrane.org), Knowledge Translation Project Manager, Cochrane.

2 Defining the need

There are many reasons for a Cochrane Group, Network or Field to want to develop partnerships – with external partners, as well as internally - with other Cochrane Groups, Networks or Fields:

- A need to gain external or internal input into a priority setting process;
- The wish to jointly develop a protocol or co-produce a review;
- Wanting to increase the use of Cochrane systematic reviews through dissemination of evidence or training of potential users in interpreting the evidence;
- The need to obtain funding for the activities of a Cochrane Group, Network or Field; or
- The wish to advocate for evidence-informed health decision making, in a certain context, jointly with like-minded partners.

Being clear about the needs will help identify the best partner to work with. The expectation of any partnership is that more can be achieved in partnering than a Cochrane Group, Network or Field can achieve on its own. If approached by a partner to engage in a partnership (instead of pro-actively looking for partners), the need question should be answered too as it forms the basis of any partnership.

Tools and resources:

- Australian Government, Department of Social Services, [Partnering tools](#): Tool 1: Partnership Ready Checklist.

3 Mapping the partners

The partnership purpose will determine with whom a partnership could be developed in order to bring the added value, skills, or resources needed. If there are multiple partners that could bring this added value, considering the advantages and disadvantages of partnering with each organization or group will help decide which partnership to pursue. When approached by a potential partner to engage in a partnership, it is useful to consider whether this is the most appropriate partner, or whether there are others with whom developing a partnership would be more beneficial.

Questions to be asked:

- What organizational and collective benefits will be gained through the partnership for Cochrane/ the Cochrane Group, Network or Field and the potential partner?
- What risks does the potential partnership incur for Cochrane/ the Cochrane Group, Network or Field?
- How does this activity advance Cochrane's mission, vision, and *Strategy to 2020*?
- What organizational costs or harms might Cochrane/ the Cochrane Group, Network or Field incur? What would be the costs or harms for the potential partner? Consider also potential conflicts of interests.
- What is the level of commitment of each partner towards the proposed partnership? (i.e. seniority of staff engaged in discussion; match with organizational mandates; potential resources committed).

Cochrane's [partnership policy](#) also outlines the minimum criteria for the partner when working with Cochrane. The partner should:

- Be willing and able to commit to helping Cochrane advance its mission, vision, and *Strategy to 2020*.
- Be willing to declare its source of funding should Cochrane request this.
- Be willing to make the partnership and the report on its activities publicly available.

It is useful to make sure at an early stage in the discussions that these minimum requirements can be adhered to.

Tools and resources:

- MEASURE Evaluation (2011). [Stakeholder Engagement Tool](#). North Chapel, NC: MEASURE Evaluation, USAID. (see chapter 3 for a template stakeholder analysis matrix) (This resource is available from: the [National Collaborating Centre for Methods and Tools](#))
- From Tools4Development: [Stakeholder analysis matrix template](#)
- Vic Health, [The Partnership Analysis Tool](#). See especially [the checklist](#), providing key questions for choosing partners.
- Australian Government, Department of Social Services, [Partnering tools](#): Tool 2: Finding the Right Partner Checklist.
- Tennyson, R. (2011). [The Partnering Toolbook: An Essential Guide to Cross-Sector Partnering](#). London, UK: The Partnering Initiative. Chapter 2: Building Partnerships; Tool 1: Partner Assessment Form and Tool 2: Stakeholder mapping
- [Conflict of Interest Policy for Cochrane Groups](#)

4 Developing and maintaining successful partnerships

For a partnership to be successful, it is necessary to be specific about the joint areas of work and the management of the partnership.

Key questions to consider:

- What is the shared aim, what are the joint objectives and which joint activities will be pursued?
- How will these be implemented: Who is in charge? What are the timelines? Are there any additional (financial) resources needed and who will provide them? What are the roles and responsibilities of each partner? If conflicts arise, how will these be resolved?
- How will the partnership be managed? Is there a need for a partnership advisory group/ steering committee – involving representatives from both partner organizations? Who will be involved?
- What other issues need to be agreed upfront? For example, authorship on joint publications, acknowledgement of partners or intellectual property rights.

It is also useful to consider the level of formalization needed for the partnership. Not every partnership needs a Memorandum of Understanding or formal contract. Some partnerships mainly focus on exchange of information, or dissemination activities. An oral agreement to keep each other informed may be sufficient at the start of such a partnership.

If there is a more substantive agreement, with commitments from partners to contribute resources, establishing a Memorandum of Agreement may be useful. Some partners have their own agreement templates and formats that may need to be used, and negotiation should take place to make sure the agreement covers the essential elements from Cochrane's perspective.

Tools and resources:

- [Cochrane template MoU](#)
- Australian Government, Department of Social Services, [Partnering tools](#): Tool 3: Partnership arrangements and Tool 4: Memorandum of Understanding – A Partnership Agreement
- MEASURE Evaluation (2011). [Stakeholder Engagement Tool](#). North Chapel, NC: MEASURE Evaluation, USAID. (see chapter 3 for a template stakeholder engagement plan)
(This resource is available from: the [National Collaborating Centre for Methods and Tools](#))
- Vic Health, [The Partnership Analysis Tool](#). See especially [the checklist](#), providing key questions for making sure partnerships work.
- Tennyson, R. (2011). [The Partnering Toolbook: An Essential Guide to Cross-Sector Partnering](#). London, UK: The Partnering Initiative. Chapter 3: Partnering Agreements; Chapter 4: Managing the Partnering Process; Tool 3: Sample partnering agreement

5 Measuring success

Monitoring and evaluation of a partnership should already be considered when developing joint activities and a plan of work. At that stage, it is helpful to consider what success would look like, how it is defined and how it can be measured.

Monitoring and evaluation will be a continuous process, and will address questions such as:

- Does the partnership do what it was set out to do – are the agreed activities being achieved?
- Is the partnership adding value? Are there sufficient gains for your Cochrane Group, Network or Field? How is the benefits/costs balance?
- Can you say anything about the impact of the partnership beyond the more output oriented activities? What indicators could help assess this?
- How is the partnership management functioning? Is the management model sustainable in the longer term?

The partnership management structure can be used for a regular monitoring of progress. A more formal evaluation could also be considered.

Tools and resources:

- Tennyson, R. (2011). [The Partnering Toolbook: An Essential Guide to Cross-Sector Partnering](#). London, UK: The Partnering Initiative. Chapter 2: Building Partnerships, and Chapter 7: Successful Partnering; Tool 6: Partnership review template.
- Frank, F. & Smith, A. (2000). *The Partnership Handbook*. Hull, QC: Human Resources Development Canada. Available from: <http://publications.gc.ca/site/eng/245551/publication.html>. Available from: <http://www.nccmt.ca/knowledge-repositories/search/112> (This resource is available from: the [National Collaborating Centre for Methods and Tools](#))
- Australian Government, Department of Social Services, [Partnering tools](#): Tool 6: Evaluating the Partnership and its Program.

6 Concluding a partnership

It is useful to consider when a partnership is expected to have achieved its targets, and could be closed. Maintaining a partnership costs time and other resources. Reflecting on whether a partnership should continue or could be formally ended is therefore a good use of often limited resources.

The monitoring and evaluation process will help determine whether a partnership has achieved what it set out to do; whether there are new areas the partnership could engage in; or whether ending the partnership upon achieving its objectives is the right decision.

It is good to agree the circumstances under which the partnership may end prematurely: i.e. limited progress, loss of direction, reduction in resources, new opportunities, change of priorities. Some of these circumstances will be specified in an Memorandum of Understanding or similar agreement.

Tools and resources:

- Vic Health, [The Partnership Analysis Tool](#). See especially [the checklist](#), providing key questions for reflecting on continuing a partnership.
- Australian Government, Department of Social Services, [Partnering tools](#): Tool 7: Exiting Partnerships Painlessly.