



# Equitable Research Partnerships Toolkit

## Tool 9: Partnership Vision, Strategy and Governance Questionnaire

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The Partnership Vision, Strategy and Governance Questionnaire is designed to document an agreed vision for the research partnership and determine how this will be achieved. The questions posed help to create a focus and structure for documenting aspects of a partnership that influence equity. For example, governance and ownership of outputs.

#### Why use the Partnership Vision, Strategy and Governance Questionnaire tool?

Use the tool to create a written record of the partners' vision, both for what they want to achieve and how they wish to work together. This tool addresses equity by:

1. Drawing attention to potential inequities in research partnerships and encouraging shared acknowledgement of them.
2. Creating a written record of how a partnership will work in general, and how it will work to achieve equity. All partnership members can be held accountable to this.

#### When to use the Partnership Vision, Strategy and Governance Questionnaire tool?

Phase	Rating	Descriptions
Planning	•••	This tool is designed to be used in the planning stage of a research partnership.
Implementing	•	The tool could be adapted to focus on the partners' visions specific to the implementing stage.
Disseminating	•	The tool could be adapted to focus on the partners' visions specific to the disseminating stage.
Sustaining	••	The tool could be used to evaluate achievement of the vision, or to adapt the vision to a future phase of the partnership.

#### Ratings

••• Designed for this stage | •• Can be used as is in this stage | • Can be adapted for use in this stage



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How long does it take to use the Partnership Vision, Strategy and Governance Questionnaire tool?

### Rapid approach

- To rapidly implement this tool, compile strategy and governance documents that are already in place. This might take 30-60 minutes.

### Intensive approach

- A more intensive approach might involve bringing partners together, in a face-to-face or virtual meeting space, and asking them to develop the vision, strategy and governance documents that the questionnaire investigates. This approach might require a half or full-day workshop.

What other resources do you need to use the Partnership Vision, Strategy and Governance Questionnaire tool?

- [Partnership vision and strategy questionnaire template](#)
- Face-to-face or virtual meeting space
- Facilitator and notetaker
- Stationery, such as poster papers and marker pens (face-to-face) or whiteboard app (virtual).

How to use the Partnership Vision, Strategy and Governance Questionnaire tool?

1. Download the [Partnership Vision, Strategy and Governance Questionnaire template](#) and display it using a projector or screen sharing facility.
2. Ask representatives from each partner institution to spend 10-15 minutes writing down their institution's vision, considering both the best and worst-case scenarios (questions 1-3). Representatives from the same institutions should work together.
3. Ask a representative for each partner to share the vision, and the best and worst-case scenarios. The note taker should enter the information into the template as it is shared.



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4. As a single group (if there are six or less people), or in several small groups (if there are more than six people), discuss how the partners will work together to achieve the different partners' visions. As ideas are raised and/or points are agreed, the notetaker should record these in the template (if there is more than one group, each should have a notetaker).
5. Ask participants in the workshop to answer questions 5-14 of the questionnaire- the possible answers are all yes or no.
6. For questions answered 'Yes', identify an existing written document to attach to the questionnaire or:
  - Discuss and develop the description that should be entered in the workshop  
OR
  - Discuss and nominate a person to write-up the description and circulate for feedback after the meeting.
7. Discuss the results of the questionnaire. It may be useful to ask questions to stimulate discussion (see below for suggestions).
8. Circulate the questionnaire to all partners and provide an opportunity for partners to add content or to make amends.
9. Once the questionnaire is finalised, save it as a record of the agreed vision and strategy.

Suggested questions to explore when using this Partnership Vision, Strategy and Governance Questionnaire tool

### Primary questions

- See [Partnership Vision, Strategy and Governance Questionnaire template](#) for the primary questions.

### Additional questions

- To what extent are the partners' visions aligned and/or complimentary?
- What gaps exist in the partnership strategy and/or governance mechanisms?
- What could be done to fill these gaps?
- Do the gaps affect one partner more than others? In what way? How does this influence equity?



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### Tips for using the Partnership Vision, Strategy and Governance Questionnaire tool

- Use the completed questionnaire as a point of reference, and to inform monitoring and evaluation or for other purposes.
- Check with your institution's research office for sample agreements such as Memoranda of Understanding or Intellectual Property agreements. These could be completed and attached to the questionnaire.

### Expected outputs and outcomes from the Partnership Vision, Strategy and Governance Questionnaire tool

#### Outputs

- A completed copy of the Partnership Vision, Strategy and Governance Questionnaire.

#### Outcomes

- Increased understanding of each partners' vision and the strategy and governance mechanisms that will be employed to collectively work towards these.

### Completed example of the Partnership Vision, Strategy and Governance Questionnaire tool

Download the [Partnership Vision, Strategy and Governance Questionnaire completed example](#).

The completed example illustrates an early-stage partnership between one Globally Northern University and two from the Global South. The partners have made many general commitments (e.g. to sharing data and joint decision making). However, they have not yet developed formal written agreements and intend to do this as funding for research projects is received. In this partnership, it would be important for the partners to periodically revisit the questionnaire, as and when further written agreements to guide the partners' work and strategy are put in place.

### References and further reading for the Partnership Vision, Strategy and Governance Questionnaire

- This tool is adapted from: Afsana, K., Habte, D., Hatfield, J., Murphy, J., & Neufeld, V. (2009). Partnership Assessment Toolkit. Retrieved from [https://cagh-acsm.org/sites/default/files/pat\\_ccghr\\_regular.pdf](https://cagh-acsm.org/sites/default/files/pat_ccghr_regular.pdf)