Partnership Policy

Introduction

1. This is the web version of the JISC Partnership Policy, which was originally developed in September 2003 and revised in the light of the 2004-2006 Strategy, September 2004.

2. This revised JISC Partnership Policy describes the aims and types of partnership and defines the conditions under which JISC will enter a formal partnership. It describes the roles and responsibilities of those involved in the fostering and ongoing maintenance of formal relationships. The policy also describes the framework for partnership: the key elements of a JISC formal agreement and the process by which formal partnership is achieved.

3. This policy does not affect any previously drawn formal agreement; programme or project based contractual arrangements with organisations that might in future become formal partners.

4. This policy does not apply to JISC's relationships with Services, third-party service providers or the wide range of organisations with which JISC has informal relations as part of ongoing operational activities of JISC Executive.

Scope of JISC partnership activity

Aims of partnership

5. JISC will establish formal partnership, working at both strategic and operational level, where there are clear opportunities to achieve some or all or the following aims:

    i. Maximise the return on UK investment and help us to manage the risks involved in ICT innovation for education and research by engaging in joint programmes.

    ii. Identify and promote joint ICT activities to support education and research for learners of all ages.

    iii. Inform the national and international agendas for education and research by advising on policy and standards.

    iv. Stimulate and inform JISC's strategic and organisational development by dialogue and active sharing of information.

    v. Promote and enable knowledge transfer to help broaden expertise and knowledge across the UK and worldwide academic communities.

Types of partnerships

6. JISC enters into formal partnerships with different types of organisations for different reasons. The three types of partnership, described as follows:

    i. **Strategic Partners**: JISC's strategic partners are publicly funded organisations with a national remit to support Information and Communications Technology (ICT) for education and research. JISC works in formal partnership to deliver the aims and objectives of the JISC Strategy.

    ii. **Associate Partners**: Organisations focused on specific issues related to provision of Information and Communications Technology (ICT) for education and research. Associate partners are likely to be membership led or professional associations.

    iii. **International Partners**: Non-UK based organisations with a national remit supporting Information and Communications Technology (ICT) for education and research.

Partnership criteria

7. JISC will determine the suitability of an organisation for formal partnership against the following criteria:

    i. Shared strategic vision:

    ii. Resource availability

    iii. Deliverables

    iv. Added value

    v. Risks

JISC roles and responsibilities

8. **JISC Board** will consider and approve proposals for formal partnerships.

9. **JISC Sub-Committees** will review, consider and approve funding proposals for partnership work programmes.

10. **Executive Secretary** is ultimately responsible for the formal partnerships into which JISC enters. He will act as chief signatory to all JISC's formal agreement (except legal contracts).

11. **JISC Senior Management Team** are responsible for identifying suitable Partnership Owners and provide review for proposals for formal partnership.

12. **Partnership Sponsor** Individual members of the Senior Management Team will be nominated to champion, offer support where required to a partnership owner.

13. **Partnership Owners**: The key liaison between JISC and the partner organisation. Supported by the Partnership Manager, partnership owners are responsible for the following activities:

    i. Supporting a partnership proposal.

    ii. Negotiating any formal agreements required by the partnership.

    iii. Co-ordinating activities within scope of the formal partnership agreement.

    iv. Managing an accurate record of JISC's activities in partnership with the organisation.

    v. Ensuring that JISC and the partner organisation meet periodically.

    vi. Evaluating the performance of JISC and the partner organisation against the partnership agreement by a periodic review.

14. **JISC Executive**: are responsible for ensuring that they maintain an awareness and understanding of JISC's partners and partnership activities and that they support the activities of the Partnership Owners and Manager as appropriate.

15. **Partnership Manager** is responsible for the overall management of JISC's formal partnerships, providing support throughout the lifecycle of a partnership.

Formal partnerships

Framework for formal partnership

14. The formal agreement, most commonly, but not exclusively a Memorandum of Understanding, will describe the strategic vision and aims of the partnership, together with details of how the partnership will be managed.

15. It is anticipated that the formal agreement describes a strategic framework within which partnership activities may be managed effectively. Specific details of the deliverables of the partnership, such as programme activities are not described within the formal agreement. The formal agreement may be supported by a jointly agreed, operating plan, usually covering a specific period of time or specific set of activities.

16. Typically the Memorandum of Understanding, includes the following:

   i.   **Vision:** A shared vision, in support of a major strategic development within education and research.

   ii.   **Aims:** A description of the strategic aims of the partnership.

   iii. **Management review:** Commitment to one or more partner meetings per year, within which JISC and the partner organisation will meet to plan future activity and review progress.

   iv.   **Funding arrangements:** The Memorandum of Understanding will not include details of specific financial commitment; rather it will identify a process by which resources may be approved, accessed and released.

   v.   **Added value:** A brief description of the additional benefits of partnership, such as membership opportunities and resources, which are available to JISC and the partner organisation by virtue of the agreement.

   vi.   **Intellectual property rights:** A statement clarifying the status of all work performed on behalf of the partnership.

   vii. **Review:** A brief description of the timescales for review of partnership activities and the formal agreement.

   viii. **Timescales:** A brief description of the lifecycle of the partnership.

   ix.   **Nominated contacts:** An identified member of JISC's Senior Management Team, Partnership Owner and Partnership Manager.

Process to formal partnership

18. This section describes the process to formal partnership. It is recommended that the process be followed in consultation with the Partnership Manager.

19. A caveat to this process is that it describes the ideal state. It is acknowledged that it will not always be possible, nor appropriate to follow each step through the process, or indeed in the order here described. The Partnership Owners and the Partnership Manager will endeavour to manage the process accordingly.

   Step One: Opportunity for partnership arises.

   Step Two: Identify Key individuals.

   Step Three: Develop partnership proposal.

   Step Four: Consider / approve partnership proposal.

   Step Five: Draft formal partnership agreement.

   Step Six: Negotiate partnership agreement.

   Step Seven: Partnership agreement signed.

   Step Eight: Agree key performance measures / indicators.

Step Nine: Agree joint programme.

Step Ten: Partnership review.

Monitoring and reporting

20. The Partnership Manager will review formal partnerships on a periodic basis. The Partnership Manager and Partnership Owners will together, together with appropriate members of the partner organisation meet together to perform a periodic performance review of the formal partnership. The JISC Senior Management Team will receive periodic, whilst the JISC Board will receive an annual report. Exception reporting will be operated outside these updates.

Policy Review

21. This policy will be reviewed at the end of each academic year.

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