
3. *When to put pen to paper*

Some form of documentation is critical to most new joint relationships or projects – especially where significant funding, broad outcomes, risk and innovation are involved.

In terms of the partnering continuum described in section 1.2, you can be networking, cooperating and sometimes collaborating with a range of agencies without any type of written agreement to support your partnering activity. This is especially the case where agencies/representatives have worked together before and there is a high existing degree of trust and shared understanding. Usually in these circumstances, there are people (strategic brokers⁶) working within these organisations who skilfully and quietly bring people, ideas and projects together and make things happen almost naturally.

So, doing things informally can be just fine. In fact, for some, a very good reason not to go to paper is that documenting things can take time, time that gets taken away from the “doing” aspects of partnering. Other factors to consider when thinking about whether or not you need a formal agreement include:

- the likely duration of the joint project or process eg. short or long term
- the complexity of the task eg. running a one off forum vs. developing a citywide interagency planning process
- history between the parties eg. worked together jointly a lot, compared to a new relationship
- scale eg. small local project vs. multi-agency service
- pre-existing legislative frameworks and obligations eg. most central and local government agencies will require a written agreement of some sort to ensure accountability for public monies
- financial risk eg. million dollar service contracts compared to a contribution toward a community event or project.

Partnering action can come before written documentation or a partnering agreement. However, as people, policies and programmes change, sometimes being “undocumented” can start to feel uncomfortable or “loose”. Here are some signs to watch out for:

- you know that opportunities are being lost
- what you are trying to do together isn’t as clear as it should be
- people aren’t doing what they said they would do, or doing anything at all
- there are no agreed processes or mechanisms for moving forward
- things have become very complex and uncertain
- no one is sure who should be doing what and why, and no one knows who should know
- you know that if key people left, things would just fall over.

⁶ Strategic broker is a new term which refers to the people who make collaboration happen – they are the “glue”, bringing people and organisations together to achieve shared visions and goals. See Craig & Courtney (2004) - Potential of Partnership; page 69-77 for more.

It is generally recognised that it is probably too late to put pen to paper when you are already in trouble. So, if you can, think ahead about what might be helpful down the track and get a few key things written down at an early stage.

In summary, in terms of the “when” question, there are two useful points to consider at either the start of a process or as you’re collaborating:

1. Can you do what you want to do without any form of documentation?
2. Would the anticipated benefits from putting pen to paper outweigh the likely costs (time, resources, energy) of putting together an agreement – in the short or long term?

After making the decision that it’s time to go to paper, the next critical question is what kind of documentation best suits your needs.