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Building Successful Partnerships for Technology Transfer

Abstract

As budgets for Cooperative Extension projects get tighter, many units are enticed to consider partnerships with agencies and organizations to continue to proactively deliver services. Our experience working with the USDA Forest Service in a partnership that involves joint staffing and funding for technology transfer and research projects enables us to offer specific advice on how to use this tool most effectively. Communication and planning are essential and should cover everything from who gets office keys to who hires temporary staff.

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Many Extension and research activities are orchestrated in partnership with other agencies or organizations. Such partnerships help enhance financial resources, available expertise the number of field agents who can implement the program, the range of potential audiences, and may add political capital for selling ideas (Wondolleck & Yaffee, 2000; Monroe, Jacobson, & Bowers, 2003; Jacobson, McDuff, & Monroe, 2006). Universities and the USDA Forest Service (USFS) have a long history of successful research partnerships, but technology transfer partnerships are still fairly novel.

Partnerships vary, however, in how they function. While some agreements resemble a contract, "here are the funds; keep us updated by quarterly reports," others intend for the staff to work together, "here are the funds; let's get started." This latter category of partnerships can be extremely rewarding as well as challenging.

Extension faculty and staff from the School of Forest Resources and Conservation (SFRC) at the University of Florida (UF) have worked in partnership with staff from the USFS on both research and technology transfer projects for the last 5 years. Working together has enabled us to improve relationships, leverage new resources and projects, and respond more effectively to challenges within research and technology exchange. As the USFS and other public agencies build closer relationships with Cooperative Extension for conducting technology transfer, we offer these suggestions to assist others in developing successful partnerships.

Define It

During initial meetings to establish the partnership, it is helpful to describe and define the responsibilities, opportunities, and strategies for implementation that will define your endeavors. These initial "negotiations" can be the basis for a detailed work plan, which must be adaptive to respond to changes in personnel, funding, and new opportunities.

The plan needs to detail how partnerships intend for staff to work together; the products and who owns them; and how partners contribute (funding, resources, and personnel). Will there be a project coordinator and if so, what are the responsibilities? Who makes the final decisions regarding implementation, budgets, and hiring, and how are those decisions made? Creating a framework and defining the extent of the partnership should minimize the effects of inevitable misunderstandings. Communication is essential throughout the life of the project to create an atmosphere of trust and cooperation.

High Stakes vs. Small Wins

Partnerships often work in spotlights, touted by both organizations as ideal arrangements. Such pressure can elevate expectations to an unreasonable degree. Be sensitive to realistic requirements and expectations. If possible, start small and build success gradually (Weick, 1984). Refrain from putting all your resources into one product and expecting that it will define the future relationship together.

Working Together

When partnerships combine the staff and resources from both organizations, they also overlay both sets of regulations and cultures. While it seems petty to sort out whose rules apply, doing so can save headaches. Here are some potential areas worth discussion.

1. Use of buildings and equipment--If staff will be located in the same space, whose rules about keys, vehicles, equipment, office hours, emergency protocols, postage, and office supplies will be followed? If you have the option, choose the most flexible rules. If you must follow more limiting rules, work out these details quickly so all staff know what to expect. Periodically update rules and options.
2. Project Planning--The project details should be jointly developed and approved. Objectives, timeline, deliverables, strategies, and whose resources are used for each element must be spelled out. If the plan

needs to be amended, who makes the decisions, and how does that person seek approval from others?

3. Publications and Web sites--Most organizations have their own publishing requirements covering issues such as peer reviews and author order. If one partner will "own" a publication, their rules on publishing processes will probably be followed. If products are to be posted on a Web site, security and accessibility will need to be reviewed regularly. Make sure all contributors are acknowledged.
4. Hiring staff--Rules on hiring vary by organization. By partnering with a university, a federal agency may bring on temporary project staff as university employees more easily than hiring them through the federal government. However, this flexibility should be used judiciously because personnel matters are then the responsibility of the university. Personnel policies for the project should be identified at the beginning of the partnership. Procedures for finishing projects if an employee leaves before all deliverables are completed should be discussed.
5. Quality control and assurance--Every organization has its own process for maintaining and judging work quality. It is important to review all processes and accept the strictest rules agreeable by all partners. Organizations often differ in how they achieve quality; this too must be discussed. Technology transfer projects typically benefit from stakeholder or advisory board review and pilot testing with intended audiences. A strong partnership can create a larger pool of reviewers and a more effective product.
6. Resolving problems--Inevitably problems will occur, and how these problems are resolved can affect the partnership. Partners should invest time developing a strategy for resolving problems. If one partner ultimately is in charge, what mechanism will be implemented for others to voice expectations, limitations, and concerns? If both are in charge, will the team resolve the issue themselves, use arbitration, or use both existing administrative structures concurrently? If resolution is not attainable, the trust and cooperation built during the project may be jeopardized. At minimum, plan regular meetings to identify concerns before they become an issue.
7. Work culture--Individuals vary in how and when they work, and organizations vary in what they expect of employees. While some aspects of the partnership will blend nicely, expect to run into conflicts, especially when deadlines are looming and budgets are squeezed. Before conflicts become divisive, discuss expectations for weekend and evening work to meet deadlines or special travel. Sacrifices will occur, and they need to be distributed to the extent possible among individuals from both agencies. Discuss how those decisions will affect colleagues in the partnership and if the institutions can offer other resources or staff to help the situation.

Summary

Together, the UF/SFRC and the USFS, Southern Center for Wildland-Urban Interface Research and Information have designed research projects, produced booklets and fact sheets, written training manuals, and run workshops. We strongly believe the outputs of our activities reflect the best of both organizations and are improved because of our partnership.

Nevertheless, challenges have arisen from individual and organizational differences. Like all human relationships, our partnership requires a lot of energy and time to work through issues and maintain good communication. Overall, we believe we have been successful as indicated by awards and new funding for additional work. We suggest that as others embark on such partnerships they might anticipate some of these challenges; work from the beginning to minimize them; and establish strategies for resolving them.

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