

WHAT ARE THE ESSENTIAL MILESTONES NEW RPPs MIGHT WORK TOWARDS IN THEIR FIRST YEAR?

A self-directed guide inviting **new RPPs** to reflect on key milestones in year one

INTRODUCTION

This detailed guide and accompanying checklist are intended to help teams in the initial phases of starting a research-practice partnership (RPP) to navigate and prioritize suggested first-year activities and goals, including bringing awareness to potential challenges that might occur. We share a short set of **milestones teams might work towards** and **stumbling blocks to watch out for** in an RPP's first year, based on recommendations from NNERPP members representing both research and practice settings working within early-phase and more mature RPPs, spanning a variety of partnership types, structures, and research foci. With this guide, we aim to support emerging RPP teams as they collaboratively plan their work during their first year together.

The document is divided into three parts. Part 1 shares key milestones an RPP may wish to prioritize, organized across three levels of suggested attention (strongly consider doing, nice to do, and leave for later). Part 2 shares potential challenges the RPP may encounter during Year 1; we divide these in terms of those likely needing immediate attention and those that may wait. Part 3 shares a discussion protocol and self-reflection activity for RPP teams who may be interested in hosting a collaborative discussion about the milestones and challenges in order to support RPP planning and learning.

Each milestone or challenge is also tagged with one or more of four larger categories that we think are essential for long-term partnership sustainability: relational sustainability, goal alignment, infrastructure, and financial sustainability. Please see the Appendix (page 5) for a detailed explanation of the categories. The icons below are used to denote each category:



Relational sustainability




Infrastructure



Goal alignment



Financial sustainability

For more information about any of the milestones or challenges, click the  icon to access relevant resources from the NNERPP RPP Knowledge Clearinghouse.

This tool was created with input from a group of research- and practice-side RPPers engaged in partnership work, with guidance from Beth Vaade (Madison Metropolitan School District + Madison Education Partnership) and Sara Slaughter (Tulane University + Education Research Alliance for New Orleans), who facilitated the design discussions.

PART I: YEAR 1 MILESTONES BY PRIORITY LEVEL

Year 1: Strongly Consider Doing



Cultivate trust among partners and attend + respond to power dynamics [↗](#)

Lay the groundwork for trusting relationships based on mutual respect by communicating frequently and openly, valuing everyone's expertise, and creating the space for all partners to safely share ideas and concerns. Part of this effort will include actively working to address underlying power dynamics shaping how partnership members interact and collaborate.



Co-create a shared vision with all partners [↗](#)

Imagine, negotiate, and co-define a partnership vision that reflects all partners' big picture ideas of what you want to achieve collectively as a partnership. This vision will help orient the work towards a "north star".



Co-develop learning priorities for the partnership's work [↗](#)

Co-develop an initial set of learning priorities that center the practice-side's high-interest inquiries and also takes into account the capacity, expertise, and will across all partners to engage in such work. These priorities will facilitate the initial co-production of useful research meant to inform policy, practice, and research efforts. This is not quite a partnership research agenda but a list of inquiry areas that could turn into an agenda.



Identify + create feedback loops to support RPP health and shared goals [↗](#)

Regularly track and review your partnership's progress using a co-developed set of indicators to invite reflection on partnership health and momentum towards the team's goals.



Initiate processes to establish data infrastructure [↗](#)

Determine the kinds of data your partnership will need (e.g., existing data or new data collection), how it will be housed and secured, and draft initial agreements (e.g., data sharing agreements or memorandums of understanding) outlining such management.



Recruit or hire key personnel [↗](#)

Determine the number and type of staff needed in the first one or two years, based on your partnership structure, scope of work, and available funding, keeping in mind that part of this work may involve identifying folks who can help "champion" the partnership and its efforts across research, practice, and community spaces.



Initiate funding discussions [↗](#)

Keep an eye out for funding opportunities related to the partnership's goals, both locally and nationally, if possible. A good first step is to list current available opportunities, especially those with local funders, and establish relationships where possible. Although there may be limited opportunities, the relationship-building aspect of this tip is key, as funders are often great conveners of people, ideas, and movements.

Year 1: Nice To Do



Explore types of partnership governance structures that will be supportive of your team's relationship and partnering goals [↗](#)

Considering your team's composition, goals, and preferences, invite all partners to explore different governance structures that may be particularly supportive of mutually beneficial engagements. This might include noticing the types of organizational rules, structures, and processes for collaboration and information flow that are especially suited to the partnership's envisioned culture.

Why nice but not a "strongly consider doing"?

RPP governance is best established only after things like foundational relationships, a shared vision, learning priorities, a functional data infrastructure, and initial funding are in place. As these things take priority, partnerships often do not worry about formal governance structures until they are in their second year or later. This will also give your team time to determine what type of structure will work best for your partnership.



Identify and produce an early win that is meaningful [↗](#)

Define and work towards a smaller-scope early win that demonstrates the potential of the partnership to its members and possible funders. This may also help encourage existing and new members to continue exploring the possibilities of the RPP.

Why nice but not a "strongly consider doing"?

While more substantial research questions might require a longer-term horizon, an early win can be beneficial in the first year (as the description suggests), but this is typically not a "make or break" moment for the RPP. Progress can be defined a number of different ways and we encourage teams to think creatively about what those might be.

Year 1: Leave for Later



Develop an external communications plan [↗](#)

Outline goals for measuring + supporting external engagement with partnership-produced artifacts.

Why nice but not a "strongly consider doing"?

Establishing and following through on an external engagement / communications plan is perhaps best done under the leadership of a Communications Specialist, paired with specific tools including a website, newsletter, social media efforts, and so on. Early-stage partnerships often do not have the resources available to support such activities, and more importantly, may be better off focusing their efforts internally to start. External engagement may become important if and when the partnership prioritizes the learning of others beyond the RPP. (At the same time, the team may also wish to explore whether it makes sense to do some initial communications work, either by way of a Twitter account or the creation of a simple website.)



Develop a flexible roadmap for your RPP like a long-term or strategic plan [↗](#)

Build on your initial vision statement and draft a research agenda to support a longer-term roadmap and/or strategic plan outlining how the partnership will work towards goals requiring more time.

Why nice but not a "strongly consider doing"?

Some long-term thinking could be very helpful in planning first-year funding strategies and initial research agenda development, but getting an official roadmap to paper takes time and effort. More immediate needs, such as cultivating relationships, should take precedence but certainly, if partnerships have the room to do so in Year 1, getting started on a longer-term plan can be valuable.

PART II: YEAR 1 POTENTIAL STUMBLING BLOCKS

Watch Out: Hard to Recover From



Lack of resources: money, people, data, time, capacity [↗](#)

Why watch out: While most RPPs start out small, partnerships must be realistic about the minimum resources required to start and sustain their work. The trick lies in balancing out your types of resources: For example, shoestring budgets can work as long as the time, capacity, and commitment is there. Or, if you lack people but not money, use funding to hire more staff. The longer that critical resources remain out of balance, the more challenging it will be to recover and sustain beyond the first year.



Turnover in leadership/key staff [↗](#)

Why watch out: Some degree of turnover is a common challenge even among more established RPPs, but turnover in key leadership positions within the very first year of the partnership can be detrimental. Steady leadership as you get the partnership off the ground is key to being able to advance and grow.



Issues with data access or quality [↗](#)

Why watch out: While it may take you longer than a year to work out all data-related details, access to data required for co-developed research projects is critical. If data access becomes permanently stalled or data quality cannot be ensured, partnerships will have trouble advancing towards the shared goals dependent on such data and research.

Be Aware: Not Ideal, But You Can Recover



Political pressures [↗](#)

Why you can recover: RPPs must often navigate highly politicized environments, and while this can certainly impede partnership work, there are strategies RPPs can use to help address potential challenges, even early on. Brokers, who sit squarely between the research and practice / policy world, can be extremely valuable here, for example. Continuing to cultivate trusting relationships among partners is also key.



No clear vision [↗](#)

Why you can recover: While it is certainly preferable to create a clear vision within your first year, you can also take your second year to fine tune your vision as long as the group has some shared goals or ideas in common that enables everyone to start working together and apply for initial funding. These activities, in turn, will likely make it easier to buckle down on that vision in your second year.



Struggles to create a culture of partnership/collaboration [↗](#)

Why you can recover: Some struggles in this area are to be expected. It is beneficial to the RPP to establish a collaborative culture sooner rather than later, but if the willingness is there from all sides to stick with it even when it's hard, it is possible to recover from initial first-year struggles. Again, brokers can play an important role here in helping the team pause, notice, and reflect on the underlying challenges that may be contributing to the difficulty in establishing a culture of collaboration.

Relax: Don't Sweat It At This Point



Minimal measurable impact of the partnership [↗](#)

Why relax: As an emerging partnership, it takes a while to cultivate and nurture relationships with those intimately involved in the partnership as well as those outside the RPP. Additionally, co-developing the work that will ultimately occur and supporting its progress also takes time. Collectively, these aspects of the work may delay measurable impacts on policy and practice that may be consequential for funding, for example. Regardless, the team may prefer to co-construct internal measures of progress that can help the group keep track of its efforts towards change, which may be more useful as a way of understanding impact.



Roles and responsibilities of personnel are unclear [↗](#)

Why relax: Often individual roles and responsibilities will become clearer and even shift in ways that better align with partnership goals and work as the RPP matures. Don't ignore initial confusion over roles, but also don't stress if it takes a while to work these out.



Partners have divergent goals [↗](#)

Why relax: Year 1 of an RPP is seldom the only time partners' goals will diverge somewhat...and that's ok! This is why trust and ideally a shared vision are so important -- as long as these two things are in place, you can continue working together to define what's important for the partnership. And this is good practice for when similar issues come up again down the line: For example, if your RPP expands to include more partners permanently or even just for one particular project, co-defining and aligning goals will become important again.

APPENDIX

Each milestone has been tagged with one or more categories of partnership sustainability, defined below. We hope these additional descriptors are useful for connecting the milestones to larger questions of sustainability.



Relational sustainability

Relational sustainability refers to the human element of connection and relationship that drives the work of the partnership.



Goal alignment

Goal alignment refers to the shared vision honoring and intertwining the various goals research, practice, and community partners may have for the work.



Infrastructure


Infrastructure refers to partnership routines, processes, and physical infrastructure that helps support the work. Examples include things like regular check-ins, project protocols, data agreements, and data warehousing.



Financial sustainability

Financial sustainability refers to the resources that directly support the partnership's efforts. These include things like salaries, conference funding, and monetary and in-kind support for partnership meetings and events.

OBJECTIVE

The purpose of this protocol is to provide a structure for RPP teams to discuss and prioritize Year 1 Milestones according to partnership need. In addition, the protocol supports teams in discussing which stumbling blocks are of greatest concern and proactively plan to mitigate them. Teams are encouraged to click the  icons on pages 2-5 of the Milestones document to access relevant resources from the NNERPP Knowledge Clearinghouse which may provide further knowledge support around self-assessment.

After engaging in this exercise, we hope RPP teams have a clearer vision towards supporting the evolution and sustainability of their RPP via action steps.

TIME REQUIRED

We recommend at least 1 hour for this conversation.

ROLES

Teams will want to designate a notetaker to capture highlights of the team's discussion and a timekeeper to ensure teams are able to complete the relevant protocol steps within the time allotted.

FORMAT(S)

This activity can be conducted in-person or virtually, however, it is recommended that the discussion portion is held in a synchronous environment. The checklist can be completed asynchronously as pre-work ahead of the team discussion.

MATERIALS

- Part I: Year 1 Milestones by Priority Level
- Part II: Year 1 Potential Stumbling Blocks
- RPP Early Milestones and Stumbling Blocks Checklist

Face-to-face only:

- One piece of chart paper for each Strongly Consider Doing milestone and Watch Out stumbling block posted around the room
- 10 sticky notes per person
- Pens, pencils, markers

Virtual only:

- Virtual collaboration document, such as Google Jamboard, Zoom Whiteboard, or Padlet with Strongly Consider Doing milestones and Watch Out stumbling blocks added as headings

Google Jamboard template: <https://tinyurl.com/RPPmilestonesjamboard>

PROTOCOL STEPS

1. Before the meeting

As a pre-reading, invite each team member to read the Milestones document (Parts I and II), focusing on the seven Year 1 Strongly Consider Doing milestones (page 1) and the three Watch Out stumbling blocks (page 4). Invite team members to make notes about any questions, concerns, or feedback.

2. At the meeting -- Initial data generation

Opening Discussion. To start, invite team members to share any questions, concerns, or feedback that was generated during their initial read through the milestones and stumbling blocks (make sure the designated notetaker takes notes!).

Ranking Activity. There are at least three ways to invite team members to the next proposed activity, ranking the milestones and stumbling blocks in order of priority. In each option, individual team members are first invited to note their preferred ranking (and why); this is then followed by group discussion to sensemake together, synthesize, and perhaps arrive at a group-derived priority ranking of milestones and stumbling blocks.

- **Option 1:** Each team member can independently complete the RPP Early Milestones and Stumbling Blocks Checklist (P-3 in the Optional Guided Activity section), first providing evidence on ways in which each milestone is currently being addressed or specific concerns, and then ranking each milestone from 1 to 7, where 1 = highest priority and 7 = lowest priority. Next, team members are invited to share evidence of concern for each of the Watch Out stumbling blocks and rank their level of concern from 1 to 3, where 1 = greatest level of concern and 3 = lowest level of concern.
- **Option 2:** For face-to-face meetings, invite individual team members to first write on a sticky note their ranking for each milestone from 1 = highest priority to 7 = lowest priority. On separate sticky notes, invite team members to briefly summarize a few pieces of evidence that help support the reasons behind their ranking. Place the sticky note ranking on each "Strongly Consider Doing" milestone poster in the room (the sticky notes containing the evidence could also be placed on the posters, or team members can hold on to these for the discussion). Do the same ranking and evidence sticky note generation for the Watch Out stumbling blocks. Place these sticky notes on their respective posters in the room, as well.
- **Option 3:** For virtual meetings, invite Individuals to rank each milestones indicator in order of priority from 1 = highest priority to 7 = lowest priority and add evidence for their ranking on the Google Jamboard (please see link to template on P-1 of this optional activity section). Repeat this step for the stumbling blocks. Note that teams could also use another collaborative tool such as Zoom Whiteboard or Padlet, if that is preferred or easier.

3. At the meeting -- Discussion

Provide time for team members to examine the rankings and evidence for each milestone and stumbling block via a Gallery Walk (face-to-face or virtual). As a group, discuss any patterns in rankings or evidence, as well as any differences. It may be helpful here to sort the sticky notes by rankings or by common themes in the evidence. Use the rankings and discussion to determine the order in which the team will address the Strongly Consider Doing milestones within the first year. If time allows, discuss an approximate time frame for completion and which member(s) will lead the team in completion of each milestone. Repeat the prioritization / sensemaking discussion for the Watch Out stumbling blocks (note that depending on how much time you have allocated for this meeting, the stumbling blocks discussion may be better off as its own separate discussion).

Suggested facilitation questions for sensemaking discussion:

- Which milestones are non-negotiable for our team?
- In what areas are we already making progress or have existing strengths?
- Where are our most robust structures, policies, or practices?
- In what areas are we lacking strong structures, policies, or practices?


Notes: If you are using this protocol as a more experienced RPP team, your team might consider applying the milestones to a newer project instead of to the partnership itself. For newer RPP teams, if you feel you have made good progress on several of the Year 1 Strongly Consider Doing milestones, you may want to expand your discussion to include examination of the Try To Do and Do Later milestones. Similarly, if the Watch Out stumbling blocks are not of greatest concern to your team, feel free to expand your discussion beyond the Watch Out list to include the Beware and Relax lists.


RPP EARLY MILESTONES AND STUMBLING BLOCKS CHECKLIST


Strongly Consider Doing


Evidence:


Rank Priority (1 - 7):


 Cultivate trust among partners and attend + respond to power dynamics


 Co-create a shared vision with all partners

 Co-develop learning priorities for the partnership's work


 Identify + create feedback loops to support RPP health and shared goals


 Initiate processes to establish data infrastructure

 Recruit or hire key personnel


 Initiate funding discussions


Nice to Do

 Explore types of partnership governance structures that will be supportive of your team's relationship and partnering goals

 Identify and produce an early win that is meaningful

Leave for Later

 Develop an external communications plan

 Develop a flexible roadmap for your RPP like a long-term or strategic plan

Watch Out: Hard to Recover From

Evidence:

Rank Concern:
(1 - 3):



Lack of resources:
money, people,
data, time,
capacity



Turnover in
leadership/key
staff



Issues with
Data
Access/Quality

Be Aware



Political pressures



No clear vision



Struggle to create a culture of partnership /
collaboration

Relax



Minimal noticeable change outside of partnership



Roles and responsibilities of personnel are unclear



Partners have divergent goals



MILESTONES and STUMBLING BLOCKS QUICK REFERENCE GUIDE

MILESTONES



STRONGLY CONSIDER DOING

-  Cultivate trust among partners and attend + respond to power dynamics
-  Co-create a shared vision with all partners
-  Co-develop learning priorities for the partnership's work
-  Identify + create feedback loops to support RPP health and shared goals
-  Initiate processes to establish data infrastructure
-  Recruit or hire key personnel
-  Initiate funding discussions

NICE TO DO





-  Explore partnership governance structures that will be supportive of your team's goals
-  Identify and produce an early win that is meaningful

LEAVE for LATER

-  Develop an external communications plan
-  Develop a flexible roadmap for your RPP

STUMBLING BLOCKS




WATCH OUT

- 
 Lack of resources: money, people, data, time, capacity
-  Turnover in leadership/key staff
-  Issues with data access or quality

BE AWARE

- 
 Political pressures
-  No clear vision
-  Struggle to create partnership culture

RELAX

-  Minimal measurable impact of the partnership
-  Roles/responsibilities unclear
-  Partners have divergent goals

This one page overview is a supplemental document to "What are the essential milestones new RPPs might work towards in their first year?"

ADDITIONAL RESOURCES

NNERPP RPP Knowledge Clearinghouse:

<https://nnerpp.rice.edu/rpp-knowledge-clearinghouse/>

Zoom Whiteboard Help:

<https://tinyurl.com/usingZoomwhiteboard>

Google Jamboard Help:

<https://tinyurl.com/usingGoogleJamboard>

Padlet Help:

<https://tinyurl.com/tips4Padlet>

*We welcome your feedback on the usefulness of this protocol for your team.
If you have suggestions or ideas to share, please let us know at <https://nnerpp.rice.edu/contact/>*