PARTNERSHIP PLANNING PROCESS CHECKLIST

Partnership: "a relationship between individuals or groups that is characterized by mutual cooperation and responsibility, as for the achievement of a specific goal." - excerpt from *Beyond Enrichment: Building Effective Arts Partnerships with Schools and Your Community*

This Partnership Planning Checklist may be used as a tool to help you project the timing of your planning process. It is meant to accompany the *University of Massachusetts Learning Partnership Workbook* and is just another way to organize your planning.

Individuals or small groups may accomplish some planning elements "off-line." The projected meeting times probably will vary.

GET READY - PREPARING FOR YOUR PARTNERSHIP

Projected time frame: 2 hours - not including prep time

- WHO: Leaders from each organization, individually
- WHEN: before first joint exploratory planning meeting

___ Target organizational staff that might be involved in the partnership- what skills and abilities they might bring along
___ Identify (with staff) why you wish to collaborate (motivating factors)
___ Identify (with staff) what you want from the partnership
___ Identify (with staff) what you can contribute and what limits your participation
___ Determine what you want and need to be a willing partner
___ Determine organizational limits and constraints (personnel, facilities, financial, policy or legal restrictions- inform partner about which ones are pertinent to you)

GET SET - EXPLORING A SHARED NEED/DECIDE TO ACT IN COLLABORATION

First exploratory planning meeting: First draft plan
Projected time frame 2 - 3 hours

- WHO: Leaders from each organization collectively explore whether they have shared interests and develop first-draft plans

__ Present, compare and discuss motivation, potential role, needs, constraints, expertise, potential project planning committee members (from each partner's perspective)
__ Collaboratively develop a shared opportunity statement *(Why is this initiative planned- to what specific need, problem or opportunity is the partnership responding?)*
__ Create a tentative project idea (What would you like to do together? This will evolve as you plan; if an existing program- what works? What needs improvement? Suggest you start "small")

__ Target the beneficiaries of your project (e.g. students, teachers, artists)
- Direct beneficiaries (e.g. students, teachers, artists)
- Indirect beneficiaries (administration, families, arts staff)

__ Target core decision-making partners- create a planning team
(*those responsible for planning, evaluation, fund-raising and implementation and representative of all key stakeholders in the project or bring expertise, e.g. principal, teachers, parents, cultural organization administrators, artists, outside consultants and experts and, perhaps, students*)

__ Commit to plan a collaborative venture
__ Discuss internal communication methodologies (How will we communicate? Meetings, e-mails, telephone etc. How often? Who initiates the communication?)

SET GOALS AND OBJECTIVES

First planning meeting: Begin designing structure of partnership:
*Projected time frame 3 - 4 hours**

- WHO: Planning Committee and facilitator

___ Target advisory partners (who advise, provide funds and implement specific programs- steering committee, e.g. members of school-based leadership team, executive director, PTA president)
___ Confirm project idea
___ Discuss/document what is expected from each other? (What do educators expect from artists and vice versa; expectations translate into roles and responsibilities)
___ Write goals (What long-term goals will you achieve?)

Goals describe long-term intentions, often based on shared values

___ Write general goals (or start with specific changes or activities and convert to a goal)
___ Write short-term objectives (anticipated outcomes) for each goal
___ Target who, when, where for each objective
* *Secret ingredient to planning meetings: incorporate food, and a chance to "chat" to establish a warm rapport before getting down to business*

DESCRIBE ACTIVITIES

Second Planning Meeting: Continue Designing Partnership
Projected time frame: 2 - 3 hours

- WHO: Planning Committee

___ Describe tasks and activities (for each goal/objective)
    What activities will be done to achieve this result (objective)?
___ Target who, when, where... for each task/activity
___ Draft budget; determine who acts as fiscal agent (note: drafting a budget or at least speculating on costs may be done earlier)
___ Calculate costs for each part of the project; estimate likely sources and amounts of revenue (identify partner contributions: cash, in-kind); determine fundraising goal (gap between costs and partners' contributions)

Third Planning Meeting: Partnership Check Up (Projected time frame: 2 - 3 hours)

___ Re-confirm partnership roles and responsibilities (see Second Planning Meeting)
___ Develop a publicity/dissemination plan to publicize your partnership and its activities
___ Establish a project timeline/work plan. (Create a month-by-month- or even more
       Detailed summarization/overview of the tasks/activities previously developed plus
       other administrative tasks)

Note: *The tasks/activities previously developed support the goals and objectives can be broken down into: planning tasks, program management tasks, funding and financial tasks, partnership maintenance tasks, evaluation tasks for the project timeline/work plan.*

___ Discuss how to make decisions (by consensus, votes, delegation; how are financial
       decisions made?) and who implements
___ Create a "Letter of Agreement" for partners' signature

PLAN FUNDRAISING/ EVALUATE

Fourth Planning Meeting (Projected time frame: 2 - 3 hours)

___ Set funding goal
___ Identify prospects
___ Decide who will ask whom
___ Identify matching funds to grant
___ Develop evaluation plan

Re-visit your goals and objectives and determine:

- Why you will evaluate;
- At what level you will evaluate (e.g. program- were project objectives achieved?
   Partnership- how can this partnership be improved or sustained?
   Student learning- assess learning outcomes of participating students);
- When you will evaluate (formative, summative);
- Who will evaluate (e.g. team members, school district, outside evaluator);
- To whom you will address the results

For each goal (anticipated outcome) and objective (What observable result will be achieved?), the evaluation framework can include an indicator (e.g. evidence that an outcome was achieved; data source (e.g. where evidence will be found; evaluation methods- Who gathers data and in what way?)

FINAL STEP: GO!

___ Implement the project