

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

WHO: Leaders from each organization, individually; **WHEN:** before first joint exploratory planning meeting; *(Projected time frame: 2 hours - not including prep time)*

- ___ 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

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

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

- ___ 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:

WHO: Planning Committee and facilitator *(Projected time frame 3 - 4 hours)**

- ___ 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

WHO: Planning Committee

(Projected time frame: 2 - 3 hours)

___ 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?*)

GO!

___ Implement the project

CONTINUE TO “TAKE THE TEMPERATURE” OF YOUR PARTNERSHIP