



Partnership Planning Checklist

Strategic Partnerships



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Planning Checklist

Use this checklist to record ideas and track your strategic partnerships planning process as you apply the strategies listed below.

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Planning Checklist

Key Strategy 1: Identify Needs

Before you start to identify partners, make sure you understand your needs. Examine three sets of data as you conduct a needs assessment and establish baseline information. Look at school-level, student-level and student voice data. This checklist suggests data to collect.

Conduct a needs assessment to identify program needs.

School-Level Data

- State assessment data
- District/campus improvement plans
- School and student report cards
- Student attendance and behavior reports
- Other: _____

Student-Level Data

- Student-level needs
- Communication with teachers, principals and family members
- Other: _____

Student Voice Data

- Student survey
- Interest inventory
- Focus groups
- Other: _____

As you write needs assessment statements, be sure to make them measurable.

Needs Assessment Statement 1:

Needs Assessment Statement 2:

Needs Assessment Statement 3:



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Needs Assessment Statement 4:

Next, develop program and activity goals that align with your needs assessment statements. Be sure to make your goals SMART: specific, measurable, achievable, relevant and time bound!

Develop SMART program and activity goals.

Do you have program goals? Are they SMART program goals? Check your goal-setting status, and make plans to develop SMART goals with your team to ensure all your program and activity goals are outcome based.

- I have program goals.
- I have SMART program goals.
- I have no program goals.

Use the Y4Y tool **Program and Activity SMART Goals** from the Continuous Education course to document and develop program and activity SMART goals.

To learn more about conducting a needs assessment, see the Y4Y [Continuous Education](#) course.





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Key Strategy 2: Use Community Asset Mapping

Now that you've uncovered your needs and developed your goals, it's time to begin identifying some strategic partners to help you accomplish your mission. Community asset mapping will help your program team identify businesses, organizations, individuals and resources in your community to help you reach your goals. You can use a community map and put pins on it to mark key organizations, or use a resource mapping tool, such as the Y4Y **Identifying Partners** or **Community Resource Map**.

Here are some questions to guide your team's discussions about potential partners.

- Are there areas where our program needs additional resources to accomplish goals?

- Are there potential partners who work in an area of identified need?

- What does our program have to offer a partner?

- Would the partnership require funds from our budget?

- What level of engagement could we expect from a partner?

Use the Y4Y **Community Asset Mapping** tool to identify potential partners for your program.





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Key Strategy 3: Implement an Outreach Plan

Now that you’ve identified potential partners, think about an outreach plan. To begin, consider what you will ask each partner to do for or with your program. This will help you determine where the partnership belongs on the continuum of engagement: networking, coordinating, cooperating, collaborating or integrating.

Determine partner continuum level.

Potential Partner	Continuum Level

Develop your outreach plan.

After identifying potential partners and desired engagement levels on the continuum, it’s time to develop your outreach plan. Be sure to do your research so you can speak confidently about the partner’s work when you reach out. Here are some actions you should consider. Discuss each one with your team and record your ideas.

- Identify the benefits of the partnership.
- Define roles.
- Plan and practice how to make the ask.
- Create and practice an elevator speech.

Put your plan in action.

- Contact desired partners to schedule meetings.

Use the Y4Y **Identifying Partnership Benefits, Partnership Roles** and **Creating an Elevator Speech** tools to help with your outreach plan. Use the **Elevator Speech** Training to Go to get your staff developing their speeches.





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Key Strategy 4: Execute Your Partnerships

After reaching out to potential partners and identifying ones to work your program, develop a memorandum of understanding (MOU) to formalize the partnerships. An MOU explains how you will work together to achieve a common goal and ensures that everyone agrees to the same partnership structure.

Develop a Memorandum of Understanding

Be sure to include these elements in your MOU:

- Introduction
- Purpose
- Roles and Responsibilities
- Oversight and Terms of Agreement
- Signature and Date

During your MOU conversations with potential partners, define both partners' roles. Use this chart to identify some partners and brainstorm roles within the partnership.

Partner	Our Role	Their Role

Use the Y4Y **Developing an Effective Memorandum of Understanding** tool to create yours.





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Key Strategy 5: Preserve Your Partnerships

The work isn't done! As in our personal lives, relationships and partnerships change over time, so it's important to engage in activities that keep your relationships with partners fresh and strong. Use this checklist to be sure you and your program team are making a good effort to develop long-lasting strategic partnerships.

- Recruit partners to your program team.**
 - Establish professional learning communities.
 - Create champions.
 - Hold regular meetings with your program team.

- Maintain routine communications.**
 - Conduct monthly meetings.
 - Send regular email updates.
 - Cultivate trust.
 - Share data.

- Share resources.**
 - Share professional learning opportunities.
 - Provide space for events.
 - Step up with additional materials.

- Celebrate!**
 - Host celebratory events.
 - Recognize and highlight partners' work in your social media posts or newsletter.
 - Send thank you notes or emails.

Use the Y4Y tool **Professional Learning Communities** to help keep your partnerships strong.

