

PARTNERSHIP PLANNING PROCESS CHECKLIST

Creating Effective and Sustainable Arts and Education Partnerships

(Modeled on the University of Massachusetts Learning Partnerships Planning Workbook and adapted for the New York State Council on the Arts Empire State Partnership program)

This checklist can be used as a tool to help stakeholders plan school wide arts and education partnerships as well as smaller projects. The suggested activities may be adapted to the needs of the partnership and take place in planning committee meetings, in preparation for, or at a retreat, or in any format that allows stakeholders a voice in the planning process.

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

GET READY

Preparing for Partnership

(Who: Planning team members, stakeholders from each organization, individually or as a group; When: before first joint exploratory planning meeting OR prior to or during a planning retreat; [Projected time frame: 1 hour] Answer the following questions:

- ___What is your reason for collaborating?
- ___What do you want and need out of the partnership?
- ___What do you contribute/bring to the partnership? (e.g., skills and abilities)
- ___What limits your participation (e.g., Personnel, facilities, financial, policy or legal restrictions?)

GET SET

Exploring a Shared Need/Decide to act in collaboration

(Who: Planning Team members, and/or stakeholders from each organization collectively explore whether they have shared interests and develop first-draft plans)

First exploratory planning meeting or at a retreat (Projected time frame 2 -3 hours)

- ___Present, compare and discuss ideas and comments from the "Preparing the Partnership" section (e.g. reason for collaborating wants and needs, contributions, etc. from each partner's perspective.)
- ___Collaboratively develop a shared opportunity statement (Why is this initiative planned—what is the specific need, problem or opportunity is partnership responding? Answer the questions: "What is the challenge we wish to solve, or the need or opportunity we want to resolve? For whom-how would the school be improved, changed or different if we were successful?; What is the solution to the challenge or the end result we wish to happen?; Describe the activities we'll do to make it happen; What are the values & beliefs that should guide us in our day-to-day interactions with each other and our constituencies? [Core Values—we believe...] Select a couple people to draft a simple statement based on the group answers.

___ Collaboratively develop a shared vision—Optional. (Answer the question, “What will success look like?)

___ 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”

- ✚ Some sample structure options can be found in *The Beyond Enrichment Continuum in Beyond Enrichment: Building Effective Arts Partnerships with Schools and Your Community*, pp. 120-121 by Jane Remer

___ Target the beneficiaries of your project

- ✚ Direct beneficiaries (e.g., students, teachers, artists)

- ✚ Indirect beneficiaries (administration, families, arts staff)

___ If not already done, 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 or re-commit to plan a collaborative venture

Set Goals and Objectives

First Planning Meeting: Begin designing structure of the partnership; Planning Committee & facilitator (Projected time frame 3-4 hours)*

___ Target advisory partners (who advise, provide funds and implement specific programs—steering committee, e.g. superintendent, executive director, PTA president,)

___ Confirm and/or clarify 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 or re-visit goals--What long-term results will you achieve? (*Note: Inviting/procuring the services of a facilitator to develop goals and objectives can help speed the process*)

- ✚ Write general goals (or start with specific changes or activities and convert to a goal)

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

___ Write Short Term Objectives (*anticipated outcomes*) for each goal

___ Target who, when, where for each objective

**Secret ingredient to planning meetings: food, chance to “chat”*

Describe Activities

Second Planning Meeting (or accomplished as appropriate with planning team members): (Continue designing partnership - Who: Planning Committee; [2-3 hours]

___ Describe tasks & 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 that drafting a budget of 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 the fundraising goal (Gap between costs and partners' contributions)

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

___Re-confirm partnership roles and responsibilities (see Second Planning Meeting)

___Discuss internal communication methodologies (How will we communicate? Meetings, e-mail, telephone, etc. How often? Who initiates the communications?)

___Develop a publicity/dissemination plan to publicize your partnership and its activities

___Establish a project timeline/workplan (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 to 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" outlining vision, opportunity statement, partner roles, responsibilities, leadership, decision-making process, workplan, timeline, money, etc.

___Present "Letter of Agreement" to Steering Committee for signatures

Plan Fundraising / Evaluate

Fourth Planning Meeting (2-3 hours)

___Set funding goal

___Identify prospects

___Decide who will ask whom

___Identify matching funds to grants

___Develop evaluation plan

Re-visit your goals and objectives and determine why you will evaluate, to whom you will address the results, at what level you will evaluate, (e.g., Program--Were project objectives achieved?; Partnership--How can the partnership be improved or sustained?; Student learning--Assess learning outcomes of participating students); When will you evaluate (formative, summative); and who will evaluate (e.g., team members, school district assessment experts, outside evaluator)?

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 (e.g., who gathers data in what way)

GO!

Implement the project

- ✚ Continue to “take the temperature” of your partnership.
- ✚ **Reminder:** *Individuals or small groups may accomplish some planning elements “off-line.” The projected meeting times will vary.*

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