Defining the Partnership

Action Planning

The initial meetings between the school and the partner are the times when relationship building will occur. These meetings will be much more successful and run more smoothly if you limit their length and maintain a well-organized agenda. Business people are usually task oriented and they will often be impressed by efficiently run initial meetings. A good "secretary" who will be able to develop a complete set of minutes (and send them to all participants soon after the meeting) is probably the first person appointed (or volunteered).

The first half dozen meetings can be considered to transpire in three distinct phases:

1. Getting acquainted, organizing committees, choosing co-leaders, defining the purpose of the partnership.
2. Reviewing each other's proposals.
3. Developing the Action Plan.

The most important part of these initial meetings is to build the relationship. The actual Action Plan can take a secondary role. If the relationship is well established, there will be many beneficial action plans that will be implemented in the future. A poor relationship could doom even the finest Action Plan. It is often a good idea to have a familiarity tour to both facilities before the first meeting actually takes place so that each side has a better understanding of the procedures and restraints of the other.

Once again, stressing the fact that all partnerships are different, there are no "rules" for the creation of an Action Plan. Every Action Plan will be unique and based on the mutual trust between parties and the willingness of both parties to cooperate. Here are, however, some suggestions on how to create the Action Plan:

- Officially establish co-leaders and allow each team member some time to introduce themselves and explain why they wish to be involved in the partnership.
- Describe the partnership and allow each side to explain what they perceive as the gains to be made and their vision of its future.
- Have each side present a proposal based on their level of commitment and needs assessment. Each side should be instructed that this is merely the "wish list" and is only the basis of further discussion.
- Analyze each of the proposals in a spirit of mutual benefit. There must be no winners and losers. Both sides must be willing to give up something in order to gain something. Partnership in Peel is a win/win situation.
- Use the discussions on the proposals to start the actual Action Plan development. Open, non-threatening, "brainstorming" is a useful tool that can be employed at this stage since it allows each participant to actively contribute their ideas to the project.

- Seek specific project objectives that can be implemented and then list specific tasks that need to be performed to meet each objective. Assign individuals or a group to each task.
- Develop timelines consisting of start and end dates for all tasks required to reach the objectives. This is very important since it allows you to monitor progress and provides a sense of accomplishment as both sides work toward completing the objectives.
- Decide what resources must be expended by each side to accomplish the objectives. How will these resources be obtained? Is there any financial outlay needed? Develop a budget if required.
- Decide how you will monitor the implementation of the Action Plan. Has each person had an opportunity to participate? Have all the necessary resources been obtained and distributed? How can we also alter the Action Plan in mid-stream if it is not progressing as hoped?
- Formalize the Action Plan by writing down its salient points. It is important to remember that the Action Plan is not carved in stone - it is an evolving document that is shaped by the actions and directions of the participants. The actual Action Plan should cover the following areas:

  Curriculum Area/Business Department
  Grade (if appropriate)
  Activity
  Person Responsible
  Responsibility
  Completion Date

Each activity (and there could be many activities) should be listed so that there is no misunderstanding of the responsibilities and the time frames required.

Once the Action Plan has been established, there is one more task that needs to be completed before it can be acted upon. Review! It is very important that the Action Plan, which is the working document of your partnership, meets all the appropriate criteria. For example:

- Is the Action Plan consistent with the mission statements and guidelines of both partners?
- Is the Action Plan consistent with the vision of the partnership?
- Does the Action Plan clearly identify Who, What, When, How?
- Are the needed resources available?
- Are certain participants over-assigned or under-assigned?
- Is there an opportunity for evaluation and revision?

Once these questions have been answered, it is time to present the Action Plan to the administration of both partners for approval. In doing so, the Action Plan should be accompanied by a well written one page executive summary that highlights the major points to be addressed.

Formalizing an Agreement

Once the Action Plan has been approved, it is time to consider the actual form of the agreement. Since all partnerships are based on mutual trust and respect, some partners do not want any formalized documentation: the partnership is an evolving relationship between two parties and there is a feeling that a formalized document of agreement will make the partnership difficult to alter. On the other hand, all partnerships take a great deal of work to set up and there may be a feeling that it is necessary to formalize all that hard work in a document stating general principles.

Whatever decision is made regarding formalized or non-formalized agreements, this is the time to raise awareness about your partnership and to develop widespread support. Colleagues, board administration, trustees, learners, parents, local community press, should all be informed about the partnership and the wonderful potential that it holds for learners. This can be accomplished by press release, flyer or newsletter.

One action that should be considered is a kick-off event of some type that involves key people in both hierarchies and allows the press something "concrete" to report. It will also allow senior administration and trustees to meet and discuss the partnership with all participants. This will assist in answering some concerns that they may have regarding specific aspects of the agreement.

There are three common types of formal agreements:

- the framing document;
- the statement of agreed principles;
- the "contractual" agreement.

As mentioned earlier, some partnerships avoid all documentation. Those that formalize their relationship could use one, two or all three of the common types of formal documentation.

The Framing Document

This document is usually produced for hanging in both partners' locations to serve as a constant reminder of the relationship established between the two organizations.

Statement of Agreed Principles

This document takes the form of a page of salient points, outlining the key elements of the partnership. It may or may not be signed at the bottom by the representatives of the participants. It will include some or all of the following headings:

Title
Partners
Start Date
Goals and Objectives
Scope of the Partnership
Groups Served
Program Description
Resources Committed

Expectations
Contact Representatives

"Contractual" Agreement

The agreement is not intended to be enforceable in law nor to legally bind the parties. However, some partnership models are more comfortable with this type of formalized agreement.