**Partnership Planning Tool: [Project Name], [Partner 1] and [Partner 2]**

**[Project timeframe: Month, Year—Month, Year]**

Use this template to determine roles and responsibilities with your partners.

|  |  |  |
| --- | --- | --- |
| Role/Responsibility | Partner 1 | Partner 2 |
| Point of Contact or Designated Lead |  |  |
| Frequency of meetings, check-in communications |  |  |
| Primary service provided |  |  |
| Data collection (Method and type) |  |  |
| Data Sharing: What will be shared, who will generate, monitor a data-sharing agreement (if applicable) |  |  |
| Use of space |  |  |
| Transportation |  |  |
| Project Evaluation |  |  |
| Other Roles/Responsibilities |  |  |

**Summary Responsibilities**

|  |  |  |
| --- | --- | --- |
| Partner 1 Responsibilities |  | Partner 2 Responsibilities |
|  |  |  |

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Partner 1 Name Date Partner 2 Name Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Partner 1 Signature Date Partner 2 Signature Date

EXAMPLE

**Partnership Planning: Hill Valley Co. Marketing Plan, Hill Valley Co. and MKT 5555: Dr. Emmett Brown, Martin McFly, Jenny Parker, Rob Zemeckis (OHIO Marketing Team)**

**Project timeframe: January—April 2020**

Use this template to determine roles and responsibilities with your partners.

|  |  |  |
| --- | --- | --- |
| **Role/Responsibility** | **Hill Valley Co.** | **OHIO Marketing Team** |
| Point of Contact or Designated Lead | POC: Clara Clayton | POC: Dr. Brown  Student Lead: Martin McFly |
| Frequency of meetings, check-in communications | -Bi-weekly check in between Ms. Clayton & Dr. Brown  -Monthly progress meetings with Student Team  -Prompt response to additional emails, calls as necessary | -Bi-weekly check in between Ms. Clayton & Dr. Brown  -Weekly internal progress meetings  -Monthly progress meetings with Hill Valley Co.  -Prompt response to additional emails, calls as necessary |
| Primary service provided | -Real-world opportunity for student learning | -Development and presentation of Marketing Plan for Hill Valley Co. |
| Research/Data collection (Method and type) | -Share any relevant existing sales/marketing data | -Evaluate baseline marketing performance data  -Conduct consumer & market research: Interviews, focus groups, surveys, industry data, competitor research |
| Data Sharing: What will be shared, who will generate, monitor a data-sharing agreement (if applicable) | -All data and deliverables will be shared between partners | -All data and deliverables will be shared between partners  -Generate data-sharing agreement with OU Legal Dept. |
| Use of space | -Office space and supplies can be provided upon request with 48 hours’ notice | N/A |
| Transportation | N/A | -Will rely on their own transportation |
| Project Evaluation | -Will submit pre-assessment, mid-term assessment, and final assessment  -Will share outcomes of final plan 1-year post-implementation | -Will provide assessment templates  -Will complete pre-flections, mid-term reflection, post-term reflections  -Will record and share project outcomes |
| Other Roles/Responsibilities |  |  |

**Summary Responsibilities**

|  |  |  |
| --- | --- | --- |
| **Hill Valley Co.** |  | **OHIO Marketing Team** |
| Primary POC: Clara Clayton  Communications:  -Meet bi-weekly with Dr. Brown  -Meet monthly with Student Team  -Promptly respond to additional emails, calls as necessary  Scope of work:  -Provide real-world opportunity for student learning  Data-Sharing:  -Share any relevant existing sales/marketing data  -All data and deliverables will be shared between partners  Logistics & Evaluation:  -Office space and supplies can be provided upon request with 48 hours’ notice  -Submit pre-assessment, mid-term assessment, and final assessment  -Share outcomes of final plan 1-year post-implementation |  | Primary POC: Dr. Brown  Student Lead: Martin McFly  Communications:  -Dr. Brown to meet bi-weekly with Ms. Clayton  -Meet weekly internal progress meetings  -Meet monthly with Hill Valley Co.  -Promptly respond to additional emails, calls as necessary  Scope of work:  -Develop and present Marketing Plan  -Evaluate baseline marketing performance data  -Conduct consumer & market research: Interviews, focus groups, surveys, industry data, competitor research, etc.  Data-Sharing:  -All data and deliverables will be shared between partners  -Generate data-sharing agreement with OU Legal Dept.  Logistics:  -Provide transportation  Evaluation:  -Provide assessment templates  -Complete pre-flections, mid-term reflection, post-term reflections  -Follow-up, record, and share project outcomes (Dr. Brown) |

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Clara Clayton (Print) Date Dr. Emmett Brown (Print) Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Clara Clayton (Signature) Date Dr. Emmett Brown (Signature) Date