**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**

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| Partner 1 Responsibilities |  | Partner 2 Responsibilities |
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Partner 1 Name Date Partner 2 Name Date

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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.

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| **Role/Responsibility** | **Hill Valley Co.** | **OHIO Marketing Team** |
| Point of Contact or Designated Lead | POC: Clara Clayton | POC: Dr. BrownStudent 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 ClaytonCommunications:-Meet bi-weekly with Dr. Brown-Meet monthly with Student Team-Promptly respond to additional emails, calls as necessaryScope of work:-Provide real-world opportunity for student learningData-Sharing:-Share any relevant existing sales/marketing data -All data and deliverables will be shared between partnersLogistics & 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. BrownStudent Lead: Martin McFlyCommunications:-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 necessaryScope 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 transportationEvaluation:-Provide assessment templates-Complete pre-flections, mid-term reflection, post-term reflections-Follow-up, record, and share project outcomes (Dr. Brown) |

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

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