

Partnership Systems Flowchart*

Systems	Stage 0: Decision-Making	Stage1: Getting Ready	Stage 2: Implementing	Stage3: Evaluating	Stage 4: Continuing
Planning	<ul style="list-style-type: none"> Review Community Assessment and other program data to determine need for partnership Develop plan for recruiting potential partners with governing body and Policy Council Identify potential partner(s). Conduct at least 3 meetings with partner(s) to determine compatibility, establish mutual goals, etc. . Select partner(s) Select possible location, option, partnership model, start date 	<ul style="list-style-type: none"> Develop a detailed partnership agreement/contract Develop goals, objectives, outcomes, and an Action Plan and T/TA Plan for the partnership initiative, Determine how progress will be assessed. Revise service area plans to reflect work assigned to partners 	<ul style="list-style-type: none"> Make course corrections as suggested by ongoing monitoring results Revise plans and procedures to reflect course corrections, as needed 	Planning team <ul style="list-style-type: none"> Reviews data and recommendations of the SA team Engages with PC and GB to determine next steps 	Partnership continues? <ul style="list-style-type: none"> If yes, revisit/revise partnership plan, agreement, staffing structure, job descriptions, and other plans and procedures
Fiscal Management	Determine: <ul style="list-style-type: none"> If partnership will replace existing slots? If yes, revise budget for PC, GB, and Regional Office approval How you will raise additional funds; complete funding proposals Stipend or funding formula for partner 	<ul style="list-style-type: none"> Negotiate funding formula with partner Establish payment schedule and procedures Develop a budget Develop a system for allocating costs Plan for non-Federal share 	<ul style="list-style-type: none"> Review partner invoices and track payments to partners 	<ul style="list-style-type: none"> Calculate overall cost of partnership effort 	Partnership continues? <ul style="list-style-type: none"> If yes, revise budget to reflect changes Revise invoicing and tracking system, as needed
Governance	Engage PC and GB in discussion about: <ul style="list-style-type: none"> Partnership plan Proposed partners --Can they help in recruiting partners? Funding plan 	<ul style="list-style-type: none"> Engage GB attorney in developing and/or reviewing partnership agreement/contract Obtain approval of partnership agreement/contract from PC and GB; 	<ul style="list-style-type: none"> Inform PC and GB of Progress 	<ul style="list-style-type: none"> Representative member of PC and GB members participate in SA process PC and GB reviews SA recommendations PC and GB approve decisions to continue, revise, and/or expand 	Partnership continues? <ul style="list-style-type: none"> Engage GB attorney in review of changes of partnership agreement Obtain approval of PC and GB of revisions to partnership agreement
Human Resources	Decide who will be responsible for: <ul style="list-style-type: none"> Recruiting and negotiating with partners Orienting partners to their role Managing day-to-day interactions with partners and their staff Monitoring partner compliance with terms of agreement 	<ul style="list-style-type: none"> Negotiate grantee's role in selecting/training/ supervising partners' staff and ensuring staff meet HS credential requirements Revise internal staffing structure and job descriptions to reflect new partnership responsibilities Train participating staff from partner on overall goals and expectations for services delivery, communication, record-keeping, 	<ul style="list-style-type: none"> Continue to provide training to partner staff, as required. Meet with partner leadership to determine the adequacy of support provided by program Review and revise internal job descriptions, as needed 	<ul style="list-style-type: none"> Staff evaluations Staff surveys 	Partnership continues? <ul style="list-style-type: none"> Revise staffing structure and job descriptions, as indicated
Recordkeeping & Reporting	What systems of recordkeeping are in place for the EHS/HS program?	<ul style="list-style-type: none"> Develop record keeping process with definitions, forms and directions Ensure compatibility between management information software Train partner's teachers and staff on record-keeping requirements 	<ul style="list-style-type: none"> Partner staff enter agreed-upon data and conduct analyses according to schedule Determine any record-keeping and reporting requirements of partner agency and outside funders 	<ul style="list-style-type: none"> Prepare report about partnership process, outcomes, and cost data to facilitate meaningful discussions by SA team 	Partnership continues? <ul style="list-style-type: none"> Revise record-keeping and reporting procedures based on recommendations from SA and planning teams

*Note: Stages for specific partnership activities may vary.

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Ongoing Monitoring	Consider how the current ongoing monitoring system will need to change if the partnership is adopted.	<ul style="list-style-type: none"> Agree on how program and partners staff will share OGM responsibilities Agree on what data will be collected to track progress of the partnership 	<ul style="list-style-type: none"> Monitor data entry for completion and accuracy Monitor implementation of ERSEA and services by partner Suggest course corrections, as indicated 	<ul style="list-style-type: none"> Share data, findings, and course correction activities with SA team 	Partnership continues? <ul style="list-style-type: none"> Revise monitoring process and schedules based on recommendations from SA and planning teams
Facilities & Equipment	Determine if: <ul style="list-style-type: none"> Partnership will eliminate need for some existing space? Will additional space be needed? Renovations;/construction Equipment/supplies neededby partner 	<ul style="list-style-type: none"> Identify and prepare space for service delivery (Will a facility need to be renovated? Is there a need for new construction? Playground upgrade? Identify needed supplies and equipment and determine who will purchase 	<ul style="list-style-type: none"> Conduct regular health and safety checks Feed results of check into OGM system 		Partnership continues? <ul style="list-style-type: none"> Make changes as recommended by SA and planning teams
Communication	Develop written description of the proposed plan and talking points to share with GB, PC and potential partners Meet with potential partners to discuss what each partner brings to the table	<ul style="list-style-type: none"> Draw up a plan for regular meetings Develop detailed description to share with stakeholders Develop detailed description of communication flow between the grantee and partner Develop a conflict resolution plan Host a Q & A session with all staff of each organization 	<ul style="list-style-type: none"> Host regular check-in meetings between program and partner leaders to discuss progress and identify problems or misunderstandings 	<ul style="list-style-type: none"> Share partnership data report with SA team 	<ul style="list-style-type: none"> Share results and recommendations from SA team and determine partners' interest in continuing.
Self-Assessment		<ul style="list-style-type: none"> Identify partner's responsibility in SA process, e.g., as SA team members, as focus group participants 	<ul style="list-style-type: none"> Partner staff participate in SA as negotiated 	SA team: <ul style="list-style-type: none"> Reviews partnershipprocess, outcomes, and cost data along with other program data to determine progress on goals, and to suggest changes in HR, facilities, etc. Assess the adequacy of data collected Makes recommendations regarding continuation, revision and/or expansion 	
ERSEA	Decide: <ul style="list-style-type: none"> Partner's role in recruiting, selection, and enrollment 	<ul style="list-style-type: none"> Identify partner's ERSEA contact Develop selection criteria Revise ERSEA plans andprocedures to reflect partner's responsibilitiies Train parterns staff on ERSEA responsibilities 	<ul style="list-style-type: none"> Partner staff carry-out ERSEA tasks, as per agreement Program's partnership contact meets with partner's ERSEA contact to assess progress, as needed 		Partnership continues? <ul style="list-style-type: none"> Make changes as recommended by SA and planning teams