

# Appendix B

## Partnership Checklist

### Defining the partnership

#### Values...what do we know about each other?

- Has a clear public interest been identified?
- Do partners have a clear understanding of the other's organization (objectives, processes, policies, interests, values, and constraints)?
- Is the partnering effort compatible with our respective missions and resources?
- Is there a clearly evident (value-added) benefit to working together?
- Do partners' assets and liabilities (time, staff, organizational capacity), public image, and constituency characteristics meet each other's needs?

#### Vision...what do we want to achieve?

- What is the purpose of the partnership?
- What general conditions must exist to be successful?
- Who are the existing partners or potential partners? Are they the right partners?
- Who are the affected stakeholders?
- Where and when will the activity take place?
- Have goals and objectives and mutual benefits been identified?

#### Stamina...what must we always have to make the vision happen?

- Have we agreed who (and how we) will make decisions?
- Do we have compatible expectations about the outcomes?
- Are we focused on meaningful outcomes?
- Have we defined the limitations, risks, and constraints facing us?
- Do we have the needed skills, resources and motivation necessary to sustain the relationship?
- Are timeframes, assets and milestones in place to accomplish our goals?
- Do we have the passion, patience, imagination, persistence and leadership to make this happen?
- Have we established an atmosphere of trust, candor, honesty and respect to move the partnership forward?

### Work Plan and Agreement

#### Information ...What are the specific goals and objectives of the partnership?

- Do we have a marketing plan in place to engage with others and promote the work?
- Has a communication plan been developed to construct messages and disseminate them to affected parties?

#### Planning, Budget, and Authority Needs – What are the specific tools we need to meet requirements?

- Is the need identified in Master Plans, OMP or 5-year work plan?
- Are budget packages included for the partnership and in out years if necessary?
- Is it identified in other local, regional or national initiatives, and if so, how do we complement it?
- Do we have the legal authority to enter into the partnership?
- Have we clarified guidance and regulations for any uncertainties?
- Do we have authority to work with NGOs?

#### Resource Assessment – what capacity and mustering does it take to do the job?

- Who's going to work on this? Are team leaders trained and well versed in partnering methods and limitations? Who will step in if a team member leaves?
- Have sources of funding been identified?
- Do we have strategies for closing the gaps between needs and available resources?
- Is there an estimate of the total resources needed?
- Do we have the resources to fulfill our end of the partnership?
- Is a fundraising campaign by the partner required?
- Is funding being solicited by the partner?
- Is the partner a federal agency?
- What in-kind services are offered?

#### Business Planning – what business details are critical to our success?

- What tools and agreements do we have to make this happen?
- Has the proper type agreement been selected?
- Has the draft agreement been reviewed by the appropriate decision makers and by legal counsel?
- Will the activity be accomplished in one fiscal year? Does the timeframe match the appropriate tool?
- Does the partnership involve a transfer of funds?
- Does the activity take place on leased or licensed land?
- Will the activity involve a long-term commitment from the partner for maintenance?
- Does the activity involve a contract?
- Will the partner or the Corps administer the contract(s)?
- How will use of partnered resources be documented?
- Are procedures in place to deal with conflict?
- Has a project delivery team been formed?
- Are PMBP/corporate management principles applied?
- Is a process for auditing in place?

#### Compliance – What are our legal obligations and concerns?

- Have historic properties, environmental and other issues been identified?
- Who will cover these clearances?
- Do regulations held by our partners have negative implications for us?

- Are partners aware of ethical issues tied to fundraising?
- Are there ethical issues tied to recognition?
- Are there image issues with a prospective partner?
- Have we addressed the use of uniforms, agency icons, logos and imagery?
- Can partners use real property?
- Can partner's use capitalized and office property?

## **Implementation**

### Create a Positive Culture - How do we keep everyone happy?

- Have we identified clear shared responsibilities and shared benefits?
- Do we offer real incentives?
- Have we used resources as effectively and efficiently as possible?
- Have we made an effort to keep legal documents as simple as possible?
- Does everyone have a sense of ownership for the land/resource involved?
- Do we emphasize the importance and rewards of partnerships?

### Celebrate Success and Have Fun – How do we honor our partners?

- How do we recognize the great work our partners have done?
- What can we legally purchase/provide for celebration activities?
- Were recognition efforts both internal and external (certificates, news articles, ceremonies, etc.)?
- Were political officials and other important stakeholders included?

### Evaluation

- Are lessons learned incorporated into current practices?
- Were the results of the partnership worth the time and effort spent?
- Were the stated goals/objectives accomplished?
- What was the actual cost vs. initial estimate?
- How much time did you actually spend on this partnership - actual cost vs. initial estimate?
- Has the partnership been successful according to the measures identified?

## **Milestones in the planning/implementation process**

### Initial Phase

- Desired priority?
- Policy: consistency and appropriateness?
- Regulatory/compliance requirements?
- Capacity?
  - Fundraising plan complete
  - Funding secured and budget complete
  - Communication plan complete
  - Defining partners' roles
  - Exit strategy
- Legal review of proposed venture?
- Statements of intent and interest?

- Higher office approval to proceed?

#### Defining the activity/product

- Scoping: focus group or scoping session
- Planning tools: models, data, techniques
- Themes and functions determined
- Meeting partners' needs

#### Instrument Development

- Negotiation
- Agreement complete

#### Planning and Design

- Planning workshop
- Projected uses and benefits/costs
- Implementation costs
- Cost estimates
- OM requirements
- Phasing
- Partners' roles in implementation and operation
- Dealing with changes
- Design plans complete

#### Implementation

- Contracts complete
- Recognition plan complete
- After action plan complete
- Evaluation
- Follow-up/corrections
- Celebration and recognition