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| **Partnership Concept Title Goes Here** |

Partner Organization 1

Point of Contact

Partner Organization 3

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Partner Organization 5

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Partner Organization 2

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Partner Organization 4

Point of Contact

Partner Organization 6

Point of Contact

# template Purpose and Context

This template is to be used to develop a partnership concept note, which is a critical document that concisely captures the key components—partners, purpose, roles, contributions, and activities—of a proposed partnership to be used to secure buy-in from stakeholders during the **Align** phase of the **LABS methodology** described in *Partner with Purpose*. Specifically, it should be used during the **Prioritize and Co-Create** sub-phase to add definition around the partnership so that it can be moved forward.

The concept note can be thought of as a tool to:

* Help provide a standard structure to partnership concepts to evaluate strengths and weakness of competing solution sets to an identified problem.
* Identify and fill potential gaps in partner contributions and capabilities.
* Secure buy-in from potential partners and internal stakeholders.
* Build upon to develop a Partnership Agreement (See SteveSchmida.com for a partnership agreement template).

The concept note’s **key audience will be decision makers** at (potential) partner organizations. As such, it should be as concise as possible while including critical details that highlight the resource ask for each partner and the value that the partnership will deliver to each partner. The concept note development will be iterative and may need to include different types of details depending on partner demands so use the template as a starting point and be ready to adapt as you listen to partners, develop strong relationships and co-create a successful partnership.

Building a shared vision for a partnership is not easy. It takes **time and patience**. However, it is critically important that partners become fully aligned and understand what is expected of each other. In order to develop a successful partnership concept, it is important to keep the following six objectives in mind:

1. Develop common goals

2. Create a framework of shared risks and rewards

3. Leverage the resources and capabilities of the partners

4. Build sustainable innovations

5. Be sensitive to the complexity of local communities

6. Measure results

Below, we have outlined the concept note and included instructions/key considerations to help frame each section.

\*Instructions/key considerations are in grey and can be deleted before presentation, as can this page.\*

# purpose

## *What are the partners aiming to achieve through the partnership*? What are the shared goals and objectives? The partnership goal is a clear and succinct summary of what the partners hope to achieve through collaboration.

## First, describe what is the problem we are trying to solve? In this context, the term problem may mean more than a headache or a challenge; a problem can also refer to a business or market opportunity.

## The purpose statement should be framed so that indicators can be developed to evaluate progress and success.

## A. Partner Motives

For each partner, clearly and succinctly summarize the partnership’s value proposition. By understanding and being transparent of motives, partners can use the **partnership results chain** to design partnership activities as well as measure and manage the partnership’s impacts.

## Partner A

## Partner B

## Partner C

# roles and responsibilities

*What roles will the various partners undertake in the partnership? What responsibilities will each partner have?* The best way to concisely convey this information will vary depending on the model of cross-sector partnership being developed. In this section, first describe the partnership modality (joint project, joint program, multi-stakeholder initiative, collective impact, or a hybrid approach). Then summarize partner roles and responsibilities that are matched to their motives, core competencies, and resource contributions. For more complex partnerships, consider using a matrix to summarize roles and responsibilities. A bulleted list can be used for simpler partnerships.

## A. Resource Contributions

At this stage, summarize potential resource contributions to ensure there are no critical gaps and that the goals are likely achievable with the resources available. What resources are the partners contributing to the partnership? Is there a specific dollar amount of funding to be provided? Can other resources be quantified? What is the timetable by which the resources will be delivered?

Each partner contributes something of value to the partnership. These contributions, also known as **inputs**, can take many forms—funding, investment, expertise, technology, market access, legitimacy, network—depending on the focus, complexity, and goal of the partnership as well as the capabilities and resources of the partners.

# activities and results

*What activities or tasks will be completed under the partnership?* Are there phases to the project or program? How will these be sequenced? At this stage, give a high-level summary of how the partners will use the inputs received to conduct activities aimed at achieving the intended goal. Each activity should have a clear result that is linked to the partnership goal and the partners’ motives. The results need to be clearly articulated and tracked through concrete indicators. We recommend using the acronym **SMART** to define your results indicators according to five criteria. The indicators should be able to be tied back to discrete components of the partnership objective statement:

* **Specific**. Be as clear as possible about what you want to achieve, defining it in terms that everyone can agree upon.
* **Measurable**. Use indicators that can be tracked and measured in numerical terms. Cost may play a role in the indicators you develop, since some indicators are relatively easy to track and measure, while others can be very expensive. But within the limits of practicality, the more precisely measurable, the better.
* **Achievable**. For the partnership to have a reasonable chance of success, each indicator needs to be achievable within a realistic time frame and at an affordable cost.
* **Relevant.** The achievement of each indicator should contribute demonstrably to the partnership goal.
* **Timely.** Indicators need to be time-bound, with subsidiary benchmarks to help track progress toward their achievement.