

1.5.1 PARTNER ENGAGEMENT PLANNING TEMPLATE – EXAMPLE

This completed example demonstrates how a community might use the Partner Engagement Planning Template. It is intended to guide users and illustrate realistic levels of detail. Communities may adapt as needed.

1. INITIATIVE OVERVIEW (EXAMPLE)

Initiative / Project Name	Community	Lead Organization	Primary Contact
Healthy Brain Community Initiative	South Dakota Community	West River Public Health	Jane Doe, Community Health Coordinator

2. PARTNER IDENTIFICATION & OUTREACH LOG (EXAMPLE)

Partner Organization / Individual	Sector	Contact Name & Info	Proposed Role / Contribution	Outreach Method	Date Contacted	Response / Status	Notes
Dakota at Home	Aging Services	Mary Sass, Director	Caregiver outreach & referrals	Email	3/5/26	Confirmed	Interested in support groups
Public Library	Library	James Reed, Librarian	Host education events	In-person meeting	3/10/26	Confirmed	Meeting room available
Local Clinic	Healthcare	Dr. Jones	Clinical referrals & speakers	Phone call	3/12/26	Pending	Follow-up scheduled

3. CONFIRMED PARTNER ROLES & COMMITMENTS (EXAMPLE)

Partner	Role in Initiative	Time Commitment	Activities Involved	Point of Contact	Start Date
Dakota at Home	Caregiver outreach	2 hrs/month	Promotion, referrals	Maria Lopez	4/1/26
Public Library	Event host	As needed	Education sessions	James Reed	4/15/26

4. ENGAGEMENT & COMMUNICATION PLAN (EXAMPLE)

Partner or Group	Communication Method	Frequency	Responsible Party	Notes
Steering Committee	Email & meetings	Monthly	Lead organization	Standing agenda
Community Partners	Email updates	Quarterly	Outreach lead	Include success stories

5. REVIEW & REFLECTION (EXAMPLE)

What is working well in partner engagement?

Partners are responsive and see value in collaboration.

What challenges or gaps have been identified?

Limited representation from behavioral health providers.

What adjustments or next steps are needed?

Prioritize outreach to behavioral health organizations next quarter.