

1.5 PARTNER ENGAGEMENT PLANNING TEMPLATE

This template is designed to be used alongside the 1.4 Partner Engagement Checklist. It helps communities document outreach efforts, clarify partner roles, and track engagement over time.

Instructions: Complete this template as partners are identified and engaged. The template may be updated regularly and used by the steering committee or lead organization.

1. INITIATIVE OVERVIEW

Initiative / Project Name	Community	Lead Organization	Primary Contact

2. PARTNER IDENTIFICATION & OUTREACH LOG

Partner Organization / Individual	Sector	Contact Name & Info	Proposed Role / Contribution	Outreach Method	Date Contacted	Response / Status	Notes

3. CONFIRMED PARTNER ROLES & COMMITMENTS

Partner	Role in Initiative	Time Commitment	Activities Involved	Point of Contact	Start Date

4. ENGAGEMENT & COMMUNICATION PLAN

Partner or Group	Communication Method	Frequency	Responsible Party	Notes

5. REVIEW & REFLECTION

What is working well in partner engagement?

What challenges or gaps have been identified?

What adjustments or next steps are needed?

This template supports intentional, inclusive, and sustainable partner engagement and should be used alongside the Partner Engagement Checklist.