

Engaging the Right Partners

Worksheet: Developing a Recruitment Action Plan

This tool is designed to help you map out and track which potential partners you will recruit, and when and how you will reach out to them.

Potential Partner	Recruiter	Desired Action	Approach	Timeline	Outcome and Next Steps
<p>Whom do you want to recruit?</p> <p>(If you don't have individual names, list the organization.)</p>	Who will do the recruiting and why?	What do you want your potential partner to do?	<p>What actions will you take to recruit?</p> <p>(Remember that what you do should depend on your relationship with the individual and how much time you have.)</p>	What is your timeline for engagement?	How did things work out? Is the partner on board? What are your next steps?
<p><i>Example: Dr. Bill Haddock, Director of Pediatrics, South Bay Community Health Center</i></p>	<p><i>Miriam: She and her son are both patients at South Bay Community Health Center</i></p>	<p><i>(Short-term): Want Dr. Haddock to present on brain development in adolescence at upcoming prevention conference.</i></p> <p><i>(Long-term): Want Dr. Haddock to join our coalition to provide medical credibility to our efforts.</i></p>	<p><i>Miriam will: drop off materials on the upcoming conference at Dr. Haddock's office (also include a written note asking if he's available to present in October).</i></p> <p><i>Miriam will also send an email. Will follow up within a week for a response.</i></p>	<p><i>9/1: Send initial introductory email and drop off materials</i></p> <p><i>9/8: Follow-up phone call</i></p>	<p><i>9/10: Dr. Haddock interested in presenting at conference. Will ask him after conference if he is willing to join the coalition.</i></p>

Worksheet: Developing a Recruitment Action Plan

Potential Partner	Recruiter	Desired Action	Approach	Timeline	Outcome and Next Steps
Whom do you want to recruit? (If you don't have individual names, list the organization.)	Who will do the recruiting and why?	What do you want your potential partner to do?	What actions will you take to recruit? (Remember that what you do should depend on your relationship with the individual and how much time you have.)	What is your timeline for engagement?	How did things work out? Is the partner on board? What are your next steps?