<table>
<thead>
<tr>
<th>INSTRUCTIONS</th>
<th>Tactics</th>
<th>Tools, Artifacts</th>
<th>Partnership Issues</th>
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</thead>
</table>
| Identification | • 1, 2, or 3 methods you will use to identify what the universe of possible SMMs would or should be | • (if applicable) 1, 2, or 3 key tools used to identify the universe of SMMs  
• And/or artifacts related to filtering mechanisms or other decision tools | • 1, 2, or 3 issues related to the partnership that came up in this stage (ex: shared responsibilities for identifying universe?) |
| Outreach | • 1, 2, or 3 methods you will use to promote the opportunity and otherwise reach out to SMMs | • (if applicable) 1, 2, or 3 key tools used to do promotion and outreach  
• And/or artifacts/examples of your outreach | • 1, 2, or 3 issues related to the partnership that came up in this stage (ex: avoiding duplication of contact by multiple parties?) |
<p>| Selection | • 1, 2, or 3 methods you used to make selections of the SMMs to participate | • (if applicable) 1, 2, or 3 key tools used to judge best candidates | • 1, 2, or 3 issues related to the partnership that came up in this stage (ex: how to blend differing criteria among partners?) |
| Fit Factors | • List factors used to determine fit; include factors that you didn’t think about during selection process but discovered after SMMs were selected (examples: bandwidth; values innovation; understands strengths, resources of university, community colleges, etc.; problem-solving culture; collaborative culture) |</p>
<table>
<thead>
<tr>
<th>SMM Engagement Funnel</th>
<th>Tactics</th>
<th>Tools, Artifacts</th>
<th>Partnership Issues</th>
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</table>
| Identification       | • Tactic 1  
                      • Tactic 2  
                      • Tactic 3 | • Tool or Artifact 1  
                      • Tool or Artifact 2  
                      • Tool or Artifact 3 | • Issue 1  
                      • Issue 2  
                      • Issue 3 |
| Outreach             | • Tactic 1  
                      • Tactic 2  
                      • Tactic 3 | • Tool or Artifact 1  
                      • Tool or Artifact 2  
                      • Tool or Artifact 3 | • Issue 1  
                      • Issue 2  
                      • Issue 3 |
| Selection            | • Tactic 1  
                      • Tactic 2  
                      • Tactic 3 | • Tool or Artifact 1  
                      • Tool or Artifact 2  
                      • Tool or Artifact 3 | • Issue 1  
                      • Issue 2  
                      • Issue 3 |
| Fit                  | • Tactic 1  
                      • Tactic 2  
                      • Tactic 3 | • Tool or Artifact 1  
                      • Tool or Artifact 2  
                      • Tool or Artifact 3 | • Issue 1  
                      • Issue 2  
                      • Issue 3 |

**Fit Factors**

• List of factors