



## Worksheet: Preparing for partner appointments

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**Summary:** This worksheet will help make the most of meetings with your small nonprofit's partners.

**Instructions (Part One):** Executive or development director fills out Part One before turning over the worksheet to the designated relationship manager.

**Instructions (Part Two):** Relationship manager fills out Part Two *after* the appointment. **DO NOT TAKE THIS WORKSHEET TO THE APPOINTMENT WITH THE PARTNER.** After filling out the worksheet, the relationship manager turns it back over to the executive director or development director for follow-through.

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### **PART ONE (executive director or development director fills out this part)**

Name of partner(s): \_\_\_\_\_

Organization (if applicable): \_\_\_\_\_

Email address: \_\_\_\_\_ Phone number: \_\_\_\_\_

How many years giving/volunteering with organization? \_\_\_\_\_

How much gifts-in-kind/money given to organization (total value)? \_\_\_\_\_

How much time given to organization (hours)? \_\_\_\_\_

Last gift/gift-in-kind (value): \_\_\_\_\_ Date: \_\_\_\_\_

Last volunteer date: \_\_\_\_\_ Project: \_\_\_\_\_

**Turn over for Part Two**

**PART TWO (relationship manager fills out this part AFTER the appointment)**

How does the partner feel we are helping her/him accomplish the good she/he wants to do in the world?

What does the partner like about working with us?

Does the partner have any suggestions for improving the work we do or how we relate to the partner?

How did the partner respond to my request to serve her/him?

Planning a gift?

- Yes
- Haven't thought about it/maybe
- No

If "yes," what amount? \_\_\_\_\_ When? \_\_\_\_\_

If "maybe," what can we provide to help her/him make the decision?

If "no," is there anything we can do to turn that into a "yes" in the future?

Personal thank-you sent

- Yes
- No