

PARTNERSHIP PLANNING CHECKLIST

A helpful checklist for nonprofit partnership practitioners
to grow existing partnerships and plan for new ones in the year ahead



Step 1: Define Partnership Goals

Begin with the end in mind. What are your goals for partnership in the coming year? By the end of this partnership planning process, your team should be clear on current partners moving forward and what gaps in funding or activation types new partners can help fill. You will also have a plan for brainstorming new ideas with current partners.

STEP 1 CHECKLIST

- ☐ **Establish your budget:** Naturally, we all want to increase our fundraising goals. But, in your plan, be specific on the funding allocation you'll be seeking, such as: unrestricted goals, key program support, or event sponsorship.
- ☐ **Factor other key partnership benefits:** Are you seeking to build awareness? Expand engagement? Corporate partners can significantly increase your nonprofit's social media and online presence and amplify your overall awareness and engagement. They can also allow you to capture the attention of new audiences and engage new potential donors.
- ☐ **Conduct a competitive scan:** What are the primary partnership activities of nonprofits in your mission sector? What innovative partnerships have you seen in the social impact landscape? How can these ideas be integrated into your upcoming plan?
- ☐ **Consider partnership activation and support strategies:** Establish specific goals for how your partnerships will generate restricted/unrestricted funding. Can you secure a corporate grant? If funds will be generated through consumer engagement, what account management and marketing support will you need to budget for?
- ☐ **Pipeline Analysis:** Determine how much of your corporate partnership budget will come from renewals and how much needs to come from new partners.

The best corporate partnerships engage partners in multiple ways. Read this report on Best in Class Cause Marketing Campaigns for top engagement strategies:

[Unlock the Winning Formulas for Best in Class Cause Marketing Campaigns - For ...](#)

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Step 2: Assess and Optimize Current Corporate Partnerships

Begin your budgeting process by forecasting current partnership opportunities. Ensure your team is clear on the status and needs of current partners in the coming year. Identify areas for organic growth. Assess gaps in funding and new activation support your partners may need.

STEP 2 CHECKLIST

- ☐ **Evaluate existing partnerships:** Determine the strengths and weaknesses of current partnerships.
- ☐ **Analyze partner satisfaction:** Gauge the level of satisfaction among current partners. Assess which opportunities, benefits and investment levels are most valuable to them.
- ☐ **Steward and upsell renewals:** Try to anticipate who is likely to renew and add organic growth and who is likely to phase out.
- ☐ **Brainstorm new ways to engage partners:** Our research shows that corporate partners feel that a top area for improvement by their nonprofit partners is bringing in new ideas and unique opportunities. Consider including your corporate partner(s) in the ideation process.

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Step 3: Identify Potential New Partners

Cultivating new corporate partners is essential to building a healthy partnership pipeline. Before beginning the prospecting process, develop a clear strategy for identifying the right prospective partners. Key steps to building a healthy prospect pipeline are the following.

STEP 3 CHECKLIST

- ☐ **Identify your partnership gaps:** Pinpoint areas where additional corporate support is needed and what types of partners are best suited to help. Retail reach? Digital presence? Brand reach? Large employee base?

Prioritize your leads:

- ☐ Brand/mission alignment is the No. 1 factor sought by companies for social impact partnerships. Create a list of companies with a record of supporting like causes.
- ☐ Identify your USP: Consider your organization's unique selling proposition and key offerings. What partner benefits will you bring to the partnership plan?
- ☐ Go deeper and wider: Once you research corporations connected to helping your cause, find multiple contacts within those companies.
- ☐ Consider your prospects' goals through researching their current activities and giving guidelines. The best match will be made when there is mutual brand and mission interest.

Leverage networks:

- ☐ Use your network, including board members and volunteers, to connect with potential new partners.
- ☐ If your organization has chapters, consider which local partners are candidates for expansion and growth. Reward chapters for leads and introductions.
- ☐ Use relationship mapping tools like LinkedIn Navigator to find warm introductions.
- ☐ Attend industry events and conferences where you can meet targeted prospects.
- ☐ Ask your existing partners for introductions to their peer groups.

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STEP 3 CHECKLIST CONTINUED

Formalize your plan:

- ☐ Identify industry sectors, companies or brands that might fill your organization's partner gaps.
- ☐ Establish your pipeline goal: Will you commit to reaching out to 25 new companies a month? A quarter? Don't let cold calling stay on the back burner.
- ☐ Be persistent: Cold outreach takes many efforts to break through.
- ☐ Be realistic with timing and know that new partnerships usually take between 6 months to a year to close.

Check out this report to better understand the corporate decision-maker perspective:

[Full Partnership Shift Report - For Momentum](#)

Need assistance with your strategic partnership planning? Reach out to For Momentum for help: www.formomentum.com/connect