

Internal Partner Engagement Checklist

A Donor Relations Roadmap

Use this checklist to guide donor-facing projects from concept to completion in order to build clarity, trust, and shared ownership with internal partners.

Relationship Foundations

- I have relationships with key partners involved
- I understand their roles, priorities, and pressures
- I'm familiar with how they talk about their work (language, metrics, timelines)

Define the Purpose ("The Why")

- The purpose of this project is clear
- The project aligns with organizational and fundraising priorities
- The intended donor outcome is defined (acknowledge, inform, engage)
- I can articulate why this project matters now

Identify the Right Partners

- Required partners are identified
- Partners are engaged early, before decisions are final
- Roles are clear (responsible, accountable, consulted, informed)
- A kickoff conversation has occurred or is scheduled

Understand Partner Realities

- Busy seasons and capacity constraints are considered
- Standard turnaround times are understood
- Competing priorities have been identified
- Timelines reflect realistic capacity

Build and Refine the Plan

- Roles and responsibilities are documented
- Timelines and dependencies are clear
- Partner feedback has been incorporated
- Success indicators are defined

Centralize the Plan

- The plan lives in a shared, accessible location
- All partners know where to find it
- Updates and expectations are visible
- Ownership is shared across the team

Communicate Clearly

- The final plan has been reviewed together
- Communication expectations are clear
- There is a process for issues or delays
- Success criteria are understood

Share Results and Value

- Final deliverables are shared with partners
- Outcomes or donor feedback are communicated
- Results are tied to original goals
- Wins are acknowledged collectively

Debrief and Improve

- A debrief has taken place
- Feedback is documented
- Lessons learned are captured
- Documentation is updated for next time

Steward Internal Partners

- Partners have been thanked intentionally
- Appreciation was timely and specific
- Relationships are nurtured beyond this project

Final Check

- Partners feel they were informed and valued
- Internal alignment was prioritized
- The donor experience remained at the forefront of all decisions

Strong donor experiences begin with strong internal alignment.

*For more samples, free resources, and expert tips, visit
donorrelations.com.*