

PARTNERSHIP & TRAINING

PLANNING WORKSHEET

A practical planning tool for businesses, nonprofits, agencies, educational institutions, community organizations, and other groups exploring training or collaborative partnerships.

PLAN WITH PURPOSE. Use this worksheet before contacting a potential partner or training provider. Clarify the need, who should benefit, the results you hope to achieve, and what each party can contribute. It is designed to be useful whether you work with Walter-James or another provider.

1 THE NEED

What challenge, opportunity, or training need are you trying to address?

Why is this important now?

2 WHO WILL BENEFIT?

Who is the intended audience? Consider employees, leaders, entrepreneurs, students, community members, professionals, or another group.

Approximately how many people could participate? _____

3 DESIRED RESULTS

What should participants know, do, improve, or be able to apply after the training or partnership?

How will you know the effort was useful or successful?

4 TRAINING OR SUPPORT NEEDED

What type of support would be most helpful? Check all that apply.

- | | | |
|--|--|--|
| ☐ Workshop / Training | ☐ Leadership Development | ☐ Professional Development |
| ☐ Workforce Development | ☐ Business / Entrepreneurship | ☐ Curriculum / Program Design |
| ☐ Technical Assistance | ☐ Customized Support | ☐ Other |

What topics, skills, or issues should be addressed?

PARTNERSHIP READINESS

Think through contributions, logistics, readiness, and the next practical step.

5 PARTNERSHIP CONTRIBUTIONS

What can your organization contribute? Consider space, participants, staff, outreach, technology, subject-matter expertise, funding, materials, or other resources.

What would you need from a partner or training provider?

6 LOGISTICS

Preferred timeframe or target date: _____

☐ In Person ☐ Virtual ☐ Hybrid ☐ Not Sure

Location (if known): _____

7 READINESS CHECK

Before moving forward, have you identified the following?

☐ A clear need	☐ Intended participants	☐ Desired outcomes
☐ Internal decision-maker	☐ Possible budget / funding	☐ Preferred timing
☐ What you can contribute	☐ What you need from a partner	

8 NEXT STEP

What is the most useful next step?

☐ Internal discussion	☐ Identify budget / funding	☐ Contact a potential partner
☐ Discovery conversation	☐ Gather more information	☐ Other

Notes / next action:

PARTNERSHIP TIP

Strong partnerships begin with a shared need and a clear purpose—not simply a request to collaborate. Be prepared to discuss the problem, audience, desired results, available resources, responsibilities, and what success would look like for everyone involved.

Walter-James Business & Development Center
Empowering Businesses. Strengthening Organizations. Building Better Communities.

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