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| **tool.jpgTools and Templates** | Prospective Partner Interview Form  ***This questionnaire form will help ensure that you are systematic and thorough in your interviews with prospective partners during the scoping step.*** |

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| ***Contact information:*** Name, Address, emails, key staff, tel numbers etc. |
| ***Programmatic Expertise*** |
| 1. **Mission**: What is the prospective partner trying to achieve in the area? Does this overlap with our goals? |
| 1. **Priority Setting**: How does the prospective partner determine what programs and activities to undertake? |
| 1. **Measures**: How does the prospective partner measure results? What have been the results? |
| 1. **Programs**: What are the prospective partner’s major program areas? Does the organization have the technical skills to implement joint projects (single area and multi-area)? |
| 1. **Portfolio Concurrence**: What specific geographic areas is the prospective partner working in, in the relevant ecoregional portfolios? |
| ***Legal Status*** |
| 1. **Incorporation**: Is the prospective partner legally incorporated in the jurisdiction in which it is active? |
| 1. **Bylaws**: Does the organization’s corporate charter allow for partnering and the type of programmatic activities envisioned in a prospective partnership? |
| 1. **Pending Actions**: Is the prospective partner currently involved in any adversarial legal proceeding or have liens against its property/assets? |
| ***Organizational Effectiveness*** |
| 1. **Board of Directors/Leadership**: How are decisions made by the prospective partner? (Board of Directors, a local leader, elected officials, a company with decisions made far away?). |
| 1. **Strategic Plan**: Does the prospective partner have a strategic plan that guides the development of operating plans and activities? |
| 1. **Financial Management:** How does the prospective partner manage its funds? Is there an audit or some type of independent review? |
| 1. **Financial Resources**: What is the prospective partner’s capacity to fund its programs and generate additional funds (fundraising or for profit)? |
| 1. **Relationships**: What other kinds of partnerships has the prospective partner been involved with (number, type of agency/organization, purpose, result, etc.)? |
| ***Values*** |
| 1. **Values**: What are the prospective partner’s key values (science-based, community-based, collaborative, process-driven, results-oriented, etc.) and where is the overlap with the Conservancy’s values? |
| 1. **Partnership**: What are the potential benefits for the prospective partner of working in partnership with the Conservancy versus working alone on its stated mission and goals? |