

Engaging a Team for Partner Selection

This chart is intended to help an organization plan internally for a new partnership project scoping process, and identify what staff need to be involved at various stages of the process.

Steps	Who needs to be involved
Establish scoping criteria according to conservation objectives of the business plan.	Project lead Organizational leadership Country/regional representatives Programmatic experts
Develop database of the full universe of organizations working on relevant issues in the new geography.	Project lead
Use the criteria created above to develop a short-list of potential partners.	Project lead Organizational leadership Country/regional representatives Programmatic experts
Hold personal meetings with short-listed organizations in order to gauge their level of interest, technical capacity and what resources they could contribute to implementing the business plan.	Same as above
Develop strategy to sequence the establishment of formal relationships with identified organizations.	Project lead Organizational leadership Legal staff Government relations staff
Communicate institutional interest in pursuing a formal relationship with the selected organizations.	Organizational leadership
Early discussions about the scope, objectives, roles and responsibilities of the partnership.	Project lead Organizational leadership Country/regional representatives Programmatic experts Representatives from partner organizations
Undertake legal, financial and organizational Due Diligence.	Project lead Legal staff Grants management staff
Negotiate partnership agreement.	Project lead Operations staff Legal staff Country/regional representatives
Get supervisory approval	Organizational leadership
Sign agreement	Director/organizational leadership Legal representative of partner organization

