**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.

<table>
<thead>
<tr>
<th>Steps</th>
<th>Who needs to be involved</th>
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| 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 |