

Prospective Partner Evaluation

Use this template to assess a potential partner for your family philanthropy services

Prospective Partner		
Partnership Type Supplier, coordination, cooperation, collaboration, etc.		
Why	Their Motivations	Our Motivations
Brand exposure, client confidence, client retention, expanded expertise, higher-quality service, new markets, optimized costs, risk reduction, etc.		
What	They Need From Us	We Need From Them
Expertise, time, space, services, resources, relationships, information, etc.		
Success Factors	They Need From Us	We Need From Them
Specific values, touchpoints, culture, expectations, milestones, terms, impact on clients/donors, impact on bottom line, etc.		

