



GUIDANCE ON HOW TO CONDUCT PARTNER SCOPING CONVERSATIONS TO MANAGE EXPECTATIONS

During scoping meetings, which are essentially get-acquainted meetings, many of your questions will be focused and systematic. This ensures that all the critical knowledge areas are covered so you can have informed discussions about the extent and capacity of various organizations and compare similar data fields. If other organizations are aware that your organization is planning a new strategy or beginning programs in a new region, they will have expectations about how you do this and who you work with. For these reasons, all team members need to be able to manage expectations and reflect why you are trying to cover such a systematic set of questions. Here's one way to frame the topic, to help you handle this sensitive situation:

“Hi, my name is _____. I work with *organization*. Thank you for letting me come and learn more about your program and tell you a bit about our plans. Our organization is interested in working on conservation projects in *geographic or programmatic area* and wants to have a better understanding of other groups that are working on important issues in the area. We appreciate this opportunity to know more about you, and tell you more about ourselves, to determine if we may find some common ground in the future.

Along with preparing a consistent message for your meetings, (and don't forget to ask if you can keep notes for internal use!), be prepared to provide:

- ❖ An overview of your organization;
- ❖ Your priorities in the region;
- ❖ Information about successful programs in country/state;
- ❖ Be prepared to offer to share tools, methods, publications etc. if requested or a particular need surfaces.