CAADS STRATEGIC PARTNERSHIPS

# Prospective Strategic Partner — Inquiry Form

*Approved by CAADS Board on October 8, 2026* | Revised November 4, 2026

**This short form gives CAADS staff enough information to screen a prospective Strategic Partner for mission fit, capacity, and the right package before any offer, pricing, or agreement is discussed. It is an intake tool, not a contract.**

## 1. Organization & Contact

| | |
|---|---|
| **Organization name:** | **Primary contact (name & title):** |
| **Website:** | **Email / phone:** |

## 2. Package of Interest (check one)

- ☐ Premier Partner — Regional Retreat, North ($10,000/yr)
- ☐ Premier Partner — Regional Retreat, South ($10,000/yr)
- ☐ Premier Partner — ThirdHouse Sponsor ($10,000/yr)
- ☐ Pivotal Partner — Board Retreat Sponsor ($7,500/yr)
- ☐ Pivotal Partner — eLearning Presenter ($7,500/yr)
- ☐ Community Partner — Innovation Track ($5,000/yr)
- ☐ Community Partner — Resource Track ($5,000/yr)
- ☐ Community Partner — Thought Leadership Track ($5,000/yr)
- ☐ Not sure yet — would like CAADS staff to recommend a fit

## 3. Fit & Background

Briefly describe your organization and the product/service you'd bring to CAADS members:

How does this serve CBAS, ADP, or ADVP providers specifically?

Existing relationships with CAADS members, state agencies, or current Strategic Partners (if any):

Two or three references (organization, contact, relationship) — ideally another association or ADS client:

Are there any active regulatory actions, litigation, or investigations involving your organization that CAADS should be aware of? ☐ No ☐ Yes — please describe:

How did you hear about CAADS Strategic Partnerships?

## 4. Acknowledgment

*I understand this inquiry does not guarantee acceptance into the Strategic Partner program, that CAADS reviews all prospective partners for mission fit before any offer is made, and that all co-branded materials are subject to CAADS approval.*

| **Signature:** | **Date:** |
|---|---|
| | |

**For CAADS staff use only**

| **Date received:** | **Reviewed by:** | **Recommendation:** |
|---|---|---|
| | | ☐ Advance ☐ Decline ☐ Refer to Brian |

*Notes (mission fit, reputational check, conflicts with current partners, staff capacity):*