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. Please complete and return to Danielle@caads.org.

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):