Community Partner Meeting Template

**Name of Organization:**

**Date:**

**Note taker:**

**Guest(s):**

* Name, Role:
  + Email:
  + Phone number:
* Name, Role:
  + Email:
  + Phone Number:
* Name, Role:
  + Email:
  + Phone Number:

**Questions:**

* **Services:** What services do you provide?
* **Coverage:** Where do you serve clients? Who can or cannot receive services?
* **Referrals:** What’s the best way to make referrals? How can we make life easier for you when referring clients? Do you have a referral form?
* **Capacity:** How many clients can you serve at a given time? What is your process when you reach capacity? What is your average waitlist time?
* **Knowledge Resource:** Can members from our office reach out with questions? If yes, who would be the best point of contact?
* **Thinking Ahead:** What do you have on the horizon at your organization? Are there any expected changes to your service delivery?
* **Expanding Partnerships:** Do you have any organizations that you regularly partner with? If yes, what is the nature of this partnership, and would there be an opportunity for us to collaborate with them as well?
* **Miscellaneous:** Is there anything that might be useful to know that we did not talk about?