



Points of Light institute Seminar

Building Partnerships That Work: Nonprofit Organizations and Employee Volunteers

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ABOUT THE TRAINER

Carole Smith has over 15 years of experience in the fields of community relations and philanthropy. She works with corporations across the country to develop community outreach programs that are tailored to meet their specific needs and reflect their culture.

While at Fannie Mae in Washington, DC, Carole designed a corporate volunteer program that earned the Points of Light Foundation's prestigious Award for Excellence in Corporate Community Service. She created and designed all aspects of Fannie Mae's *Help the Homeless Program*, including the 10,000 person Walk for the Homeless walkathon, auction, partner recruitment, and beneficiary selection process.

Carole also served as member and Vice Chairperson of the Foundation's National Council on Workplace Volunteerism. She continues to share her experience in the areas of workplace volunteerism, special events production and philanthropy with a variety of organizations.

Workplace Volunteerism

- Worked with MCI WorldCom to develop their *Local Leaders Program*, a program linking executives with civic and nonprofit organizations throughout the U.S.
- Made presentations and led workshops for the Corporation for National Service, the Conference Board and numerous local organizations

Special Events

- Chair Community Family Life Services Annual Benefit Gala, which grosses an additional 25-50 % each year
- Managed week-long retreats for Insight Meditation Community of Washington

Philanthropy

- Work with MCI WorldCom Foundation on *Hometown Help*, a signature grants program, including researching nonprofits, reviewing grant requests, and monitoring funded nonprofits
- Served as Program Officer for the Fannie Mae Foundation, specializing in quality of life grantmaking in the greater Washington, DC area
- Managed the philanthropic component of Fannie Mae's partnership with the National Basketball Association, selecting an appropriate nonprofit in each city to work with Fannie Mae and the NBA

Building Partnerships That Work:

Nonprofit Organizations and Employee Volunteers

SEMINAR OBJECTIVES

1. Identify the characteristics of successful partnerships.
2. Analyze the similarities and differences in the working cultures of potential partner organizations.
3. Examine five steps to beginning a successful partnership.
4. Apply partnership management skills to various situations.



Even if your needs are immediate
and short-term, work so that you
build long-term relationships with
your partners.





Working Definition of Partnership

a mutually-beneficial working relationship entered into by organizations* in which each partner has needs and brings value.

** We're focusing on organizations that engage volunteers and address serious social problems.*

WORKSHEET

Partnerships: The Good, the Bad, and the Ugly

Directions: In groups of two, please discuss the successful and challenging partnerships you have experienced. List the elements or characteristics of each below.

Successful Partnerships:

Challenging Partnerships:

Standards for Partnership Excellence

1. Manage the partnership's work with a plan that drives towards outcomes.
2. Foster and manage the partnership's working relationships as thoroughly as the partnership's work.
3. Engage volunteers effectively throughout the work of the partnership.

Critical Success Factors

- Common vision
- Measurable goals
- Clearly stated needs, resources, responsibilities and process
- Ongoing communication
- Paying attention to and taking care of relationships



Five Steps to Begin Successful Partnerships

1. Understand your own organization
2. Understand the needs and motivation of the other organization
3. Identify common interests
4. Plan the work
5. Agree on roles, tasks, responsibilities . . . and celebrate!



communicate ♦ communicate ♦ communicate ♦ communicate

“Differences in mission and objectives, in culture and skills, and in resources and power can make the relationship between corporations and nonprofit organizations unbalanced.”

The Aspen Institute Nonprofit Sector Strategy Group.

Cultural Differences

Nonprofit – Business – Government

- language, jargon
- measurement of success
- performance measures
- pace
- decision-making style
- competition
- organizational culture
- other

The Collaboration Challenge: How Nonprofits and Business Succeed Through Strategic Alliances, by James E. Austin. Published by the Drucker Foundation.

WORKSHEET

Cultural Differences

Directions: As each group shares its insights on cultural differences, use the worksheet below to capture those important to you.

Cultural aspect:		
Nonprofit	Business	Government
Common to all sectors:		

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Common to all sectors:

STEP 1

Understand your Own Organization

- Is your organization ready to partner?
- What do you need/want?
- What do you offer?

For nonprofit and government volunteer programs:

- Is your organization already comfortable with having volunteers involved in its work?
- Do you have in place the basic management skills and systems required to involve volunteers effectively?
- Have you made the organizational commitment to provide the leadership and management support, whether paid or volunteer, that this new partnership will require?

For business and workplace volunteer programs:

- Is there an employee volunteer program in place?
- What are the success stories of working with nonprofits or government agencies for common outcomes?
- How strong is the company's experience and competency in partnerships or strategic alliances?
- What are the employees' volunteer interests?

STEP 2

Understand the Needs and Motivation of the Other Organization

- What do they want?
- What can they offer?
- What is your history with them?
- What opportunities are you bringing?

What companies want from employee volunteer programs for communities:

- Measurable success for the nonprofit organizations as they work towards their missions.
- Measurable improvements in issues affecting communities.
- Increased efficiencies, capacities and strengths for the nonprofit organizations.
- More community needs being met.

Motivations for employee volunteers:

- **Make a difference**
- Handle increased responsibility
- Quality time with families
- Use other skills
- Friendship and fun



WORKSHEET

Understanding Other Sectors

Directions: During the report-outs, use this worksheet to capture important insights about the culture of the sectors.

Nonprofit Sector: Under what circumstances do you want to move from engaging workplace volunteers and receiving grants – to entering into a longer-term partnership?		
Circumstances	Advantages	Costs

Business Sector: Under what circumstances do you want to move from recruiting volunteers and contributing dollars to forming longer-term partnerships with organizations?		
Circumstances	Advantages	Costs

Government Sector: Under what circumstances do you want to move from recruiting volunteers (or mobilizing employees) to forming longer-term partnerships with organizations?		
Circumstances	Advantages	Costs

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STEP 3

Identify Common Interests

- Identify community leaders who can convene others.
- Articulate issues in terms of needs of community and people.
- Articulate vision of clearly understood positive outcomes.
- Consider who else should be at the table.

STEP 4

Plan the Work

- Gather information from partners about desired outcome or expected results
- Articulate the broadly worded goals or desired results
- Small group takes the information to draft a workplan
- Present draft workplan to partnership for feedback
- Modify draft
- Present modified version to partnership for acceptance

STEP 5

Agree on Roles, Tasks and Responsibilities



Pooling Resources

Directions: As a group, discuss and list the resources that each partner could bring to help address the issue. **Don't attempt to develop or discuss programs during this discussion.**

Issue: Education is under-resourced. Elementary students are testing below grade level and the high school has a high dropout rate.

The community has skilled jobs, but there is a gap between what the jobs require and what jobless community members have.

What resources such as in-kind services & materials, funding, talent & expertise, connections & access, etc. can each partner bring to this community's needs?

Schools & Universities	
Businesses	
Nonprofit organizations	
National Service members (AmeriCorps, VISTA, etc.)	
People usually 'on the receiving end' of volunteering	
Government or Government Agencies	

Other	
-------	--

Successful partnerships manage the relationships, not just the deal.

- Manage the volunteers well.
- Check your actions against the points of agreement.
- Ask for feedback on how well the organizations worked together.
- Document the success.
- Communicate the success.



LETTER 1

Dear Abbey,

I'm an executive director of a three-county food bank. I recently had lunch with another executive director whose organization addresses the housing needs of the low-income families. We talked about the shrinking economy in our three-county area and the awful toll that it's taking on our ability to deliver services.

We've invited six other nonprofit organizations who also are deeply involved in serving needs of low-income families to attend a brainstorming session to discuss ideas on what we can do to sustain and increase our services during these hard times when the need is increasing and the economy is decreasing.

I want to invite two of my board members who are business leaders, but my colleague is reluctant and said she's not sure what they can contribute to the discussion. These and other local businesses have recently had to cut back and are laying people off - so this is not the time to ask them for money.

Should I invite these board members - or any other business people for that fact? If so, how do we approach them in these tough times? What could we ask for from them? Do we approach them now or wait until we have a clear proposal?

Signed,
Desperate from the Downturn

Dear Desperate,

LETTER 2

Dear Abbey,

Community nonprofit organizations, agencies and businesses are forming a consortium to address the community needs within a specific neighborhood - the Old North End which is especially plagued with a series of problems including chronic under-employment, crime and poverty.

I'm representing the largest corporation in the consortium. We don't want to dominate or be seen as the "800 pound gorilla." Moreover, I sense that a few members in the consortium believe that a large financial donation to their organizations would be all that's needed - and seem resentful that such a donation is not forthcoming.

What can we do to 'adjust' their expectations -- and to be a productive working member of the consortium without appearing to take over? Where do I begin?

Signed,
Not King Kong

Dear Not Kong,

LETTER 3

Dear Abbey,

For the past year and a half, I've been representing my nonprofit organization in a long-standing multi-sector partnership. The meetings used to be worthwhile and provided an opportunity for us to network and exchange information important for our jobs.

But now I'm becoming frustrated because one member, a local businessperson who is not even our chairperson, is dominating the meetings. This person has repeatedly cut short discussion before we've fully explored the questions we're addressing. This person thinks she can operate in this partnership the way she runs her business. She doesn't understand how complex all the issues are that we deal with every day. We're not just selling software, here.

We want business represented in the partnership, but she is turning people off. Help! What can we do?

Signed,
Fed Up in Fairview

Dear Fed Up,

LETTER 4

Dear Abbey,

Four months ago I was asked to join a local consortium that addresses many needs of our public high school students. There are 25 school, government and nonprofit people in the consortium. There are two of us who were asked to represent business. The business community has a huge stake in these high school kids. They are our future workforce and customers. They are our own children and the children of our employees. I don't want to just make a contribution - I want to make a difference.

I was pleased to be asked to serve. I was looking for a way to get involved with schools beyond sponsoring extracurricular activities. However, I've been to three meetings in three months and I still can't get a handle on what I can do for them. I ask, "What do you want me to do - what action can I take?" and I can't get a clear answer, but they say it's important to have business represented on the consortium. During discussions, I feel like I'm drowning in an alphabet soup of jargon.

I feel like an alien in the consortium. Why can't they get it together? More importantly, what should we be doing to straighten this out? Any suggestions?

Signed,
Frustrated Businessperson

Dear Frustrated ,

Additional Resources

RESOURCES

Business, Nonprofit, Government Partnerships

Austin, James E., “The Collaboration Challenge: How Nonprofits and Businesses Succeed Through Alliances,” The Drucker Foundation, Jossey-Bass Publishers, 2000.

The Drucker Foundation, “Meeting the Collaboration Challenge Workbook,” Jossey-Bass Publishers, 2002.

Fosler, Scott, “Working Better Together – How Government, Business and Nonprofit Organizations Can Achieve Public Purposes Through Cross-Sector Collaboration, Alliances and Partnerships” A collaborative project of The Conference Board, The Council on Foundations, Independent Sector, The National Academy of Public Administration, The National Alliance of Business, National Civic League, National Governors Association. © 2002 R. Scott Fosler.

Mattessich, Paul W. et.al, “Collaboration: What Makes It Work,” 2nd Edition, Amherst H. Wilder Foundation, 2001.

Nonprofit Sector Strategy group, “The Nonprofit Sector and Business: New Visions, New Opportunities, New Challenges,” The Aspen Institute, 2001.

Aspen Institute; www.aspeninstitute.org.

Independent Sector; www.independentSector.org.

National Alliance of Business; www.nab.com.

Peter F. Drucker Foundation for Nonprofit Management; www.pfdf.org.

Points of Light Foundation; www.pointsoflight.org.

Building Relationships into Partnerships:

Suggestions for nonprofits in working with businesses as partners

1. Do some research about the workplace before you make contact. Ask the Volunteer Center if there is a Corporate Volunteer Council (CVC) and if the business is a member of the CVC. If possible, read the company's annual report. What issues or organizations does it usually support? Know the names of key contacts such as:
 - Employee Volunteer Program manager or
 - the public relations person
2. Prior to fundraising, allow your partner to get to know the nonprofit organization and become its advocate. Engaging others as volunteers for your nonprofit is a great way to build allies.
3. Make your first meeting a "getting to know you" time rather than a hard sell. Present the concept and ask for feedback & ideas on the concept. Ask if you can submit a concept paper to her/him at a specific date.
4. At the conclusion of a project or fund-raiser always send the corporate contact a letter of thanks and copy her/his supervisor and perhaps the CEO.
5. Include articles about your partners in your organization's newsletter. Send a copy of the article to your contact, and ask if it would be appropriate to send a copy to the CEO and the Public Relations department along with a letter stating the work your corporate contact did on behalf of your organization.
6. Link other business people on your board with your corporate contact; create relationship-building opportunities for others whenever you can.
7. Send meeting agendas a few days in advance of the meeting. Manage these meetings very tightly placing a time limit next to each item -- and stick to it.
8. Always indicate on the meeting agenda what specific outcomes you are looking for as a result of the meeting.
9. Schedule meetings at the beginning of the day vs. the end of the day when people may need to cancel.
10. Ask about other successful nonprofit partnerships the company has experienced.
11. Be clear and concise and stick to the "keep it simple" principle whenever you can.

Points of Light Foundation
Standards of Partnership Excellence

The Connect America Standards of Partnership Excellence are three criteria that groups of organizations can adopt to create, build & manage successful partnerships that engage volunteers to address serious social problems.

1. Manage the partnership’s work with a plan that drives toward outcomes.
2. Foster and manage the partnership’s working relationships as thoroughly as the partnership’s work.
3. Engage volunteers effectively throughout the work of the partnership.

You may want to apply the Standards of Partnership Excellence as a benchmarking tool for your partnership. If so, invite your colleagues to use this form and then discuss your responses. You may rate each criterion from 0 to 10 to indicate the degree to which your partnership aligns with the Partnership Principles of Excellence

1. Manage the partnership’s work with a plan that drives toward outcomes.

Underlying points for Standard # 1.	Not yet 0	Somewhat 5	Yes 10
1. Partnership has developed a vision statement and statement of desired outcomes. In the vision and desired outcomes, the focus is on the community issue to be addressed.			
2. There is a written workplan with desired outcomes, goals, strategies, evaluation system with timeline and budget to achieve the goals. The plan includes engaging volunteers.			
3. The partnership stays focused on its mission.			
4. The partnership evaluates its work outcomes as well as the partnership’s working relationship and the engagement of volunteers.			

Score for Standard 1: _____

2. Foster and manage the partnership's working relationships as thoroughly as the partnership's work.

Underlying points for Standard # 2	Not yet 0	Somewhat 5	Yes 10
5. The partnership has a charter such as a Memorandum of Understanding or a letter of agreement that states the purpose of the partnership and identifies roles and responsibilities for the partnering organizations -- including volunteers.			
6. Participating organizations view the partnership as a mutually beneficial relationship in which each partner both brings value to the working relationship & receives value from the working relationship.			
7. Fostering positive relationships in a partnership and including volunteers is recognized as complex work that calls for flexibility, communication and accountability among partners and volunteers.			

Score for Standard 2: _____

3. Engage volunteers effectively throughout the work of the partnership.

Underlying points for Standard # 3.	Not yet 0	Somewhat 5	Yes 10
8. Volunteers are seen as valuable human resources that can directly contribute to achieving the partnership's mission -- not solely or primarily as a means to obtaining financial or other material resources. Volunteers are engaged to expand the talents and skills available to the partnership.			
9. The roles of volunteers in the partnership's work are clearly defined.			
10. Volunteers are recognized for their contributions.			
11. The partnership evaluates the process of engaging volunteers and the outcomes from engaging volunteers.			

Score for Standard 3: _____

Total score: _____