

NONPROFIT AND COMPANY CONVENING

OVERVIEW OF FINDINGS

OCTOBER 3, 2014

WHAT DID WE LEARN?

OVERVIEW: On September 29th, Taproot Foundation convened 9 companies, 10 nonprofits, and representatives from 3 City departments to have a candid conversation about building better cross-sector partnerships to address the pressing social issues in our neighborhood. Prior to the convening, Taproot asked all invitees to submit responses to a brief survey. Drawing from both the feedback from participants and Taproot's own expertise, Taproot developed a series of small group breakout topics for the session. Participants self-selected into groups of around 5-8 people, and further explored the nuances of the topic, shared knowledge and insights from their respective sectors, and collaboratively brainstormed new ways forward. Below are some of the highlights and key takeaways from these dynamic conversations.

TOPICS EXPLORED:

- ▶ **ALIGNING RESOURCES & VISION:** How do you effectively align strategic direction & available/ needed resources? How do you best define and communicate the vision of your organization or company?
- ▶ **ADDRESSING THE ROOT CAUSE:** How might we identify and address the root causes of issues in our community? How can multi-lateral partnerships help support efforts to address root causes?
- ▶ **DUPLICATIVE EFFORTS:** How might we ensure that efforts are concerted and additive? How might we proactively identify areas of duplication and how can we address those areas?
- ▶ **COMMON CHALLENGES:** What are the other specific external and internal process or practice points that we need to better address?

ALIGNING RESOURCES & VISION

In the two groups that addressed aligning resources and vision, the following key themes emerged.

CLARIFY GOALS, NEEDS, AND RESOURCES

Both corporations and nonprofits acknowledged that they needed to do a better job of clearly articulating and defining key variables for a partnership and for their work in communities. Participants specifically wanted to clarify:

- ▶ **Priorities** of the organization or company. For instance, what issues are you most passionate about?
- ▶ A **vision for success** for their organization, company, employees, and constituents.
- ▶ **Available and needed support:** What in particular can a company offer or what specifically are the organization's needs?
- ▶ **Internal structure of support:** Who is the responsible manager or decision-maker for the initiative at the company or organization, what are the criteria for applying, and are these initiatives led by individual employees or by the company?
- ▶ Particularly **organizational culture and expectations:** What is the company or organization's risk tolerance or comfort with experimentation? Is it a culture of pilot programs or of more defined, planned programming?

INCREASE TRANSPARENCY

Once an organization or company creates their clarity of cause and purpose, each would like to do a better job of making this information more accessible. To create a level of transparency, organizations and company focused on:

- ▶ Creating **clearer, more accessible communications** of priorities, support and visions for success.
- ▶ Being more **forthcoming and direct** during all stages of a partnership from the initial discovery meeting through ending a relationship. Striving to take the guesswork out of understanding the “motivations behind the motivations.”
- ▶ Identifying the need for a **central system** to find company support or nonprofit partners.

With a renewed focus on clarity and transparency, all participants felt that we would be better able to create atmosphere of trust, honesty and directness, which would ultimately lead to more effective cross-sector partnerships.

CREATE ACTIVE COLLABORATIONS

Both sides acknowledged that partnerships take work and commitment, and a continual focus on not only what you bring to the relationship, but how what you bring serves the purposes and vision of your respective partner. Participants focused on:

- ▶ Actively **scheduling more regular meetings**, coffee or times to come together “outside of the pitch zone.”
- ▶ Maintaining a **“how can I help you?”** approach from both sides.
- ▶ Understanding and harnessing the **power of employees’ contributions and management** to build a base of support.
- ▶ **Finding and convening** companies or organizations working on similar issues.
- ▶ **Creating shared value** by addressing issues of mutual importance and benefit.

RENEW OUR FOCUS ON STORYTELLING

A compelling story can build momentum for a cause. It is both the company and organization’s responsibility to promote their work and partnership. To do this more effectively, participants focused on:

- ▶ **Understanding the various promotional channels** of the company or nonprofit.
- ▶ Actively **building communications and storytelling into the partnership criteria** and expectations.
- ▶ Thinking of **marketing and communications support as a resource**, and one which can be granted or given as part of a partnership.
- ▶ **Identify and highlight** bright spots, top level champions and star employees.
- ▶ Use these **stories as a hook** to build your momentum among colleagues, employees or peers.

ANTICIPATE AND ACCOUNT FOR GROWTH

We all have to start somewhere. By taking small steps, we can build a record of success. This incremental growth also allows each side to take stock of the progression of the partnership, and carve out time to make modifications or adjustments if needed. Participants focused on:

- ▶ **Starting small**
- ▶ Be honest if there’s a **desire for future increased or diversified levels of support**. Conversely, be upfront about the resources currently available.
- ▶ **Plan a short project** as a pilot to get people interested in deeper relationships. From there, think of creating a suite of complementary support (e.g. grantmaking, volunteering, pro bono) to deepen the relationship and the impact.

ADDRESSING THE ROOT CAUSE

Three of the groups addressed root cause, among other topics. In these discussions, the following themes emerged:

BALANCE EMPLOYEE AUTONOMY WITH COORDINATED COMPANY IMPACT

- ▶ Participating companies debated the merit of an *individual versus institutional approach* to their social impact agendas.
- ▶ When employees identify topics or projects of interest, they are often more invested in the outcome of the social impact work
- ▶ However, by approaching issues institutionally, companies may be able to maintain a more concerted, impactful strategy.

FOCUS ON AN ISSUE AREA

- ▶ All participants acknowledged that root causes can only be addressed by a *more thorough understanding of and focus on an issue area*.
- ▶ To achieve this understanding, participants proposed organizing more convenings, each themed around a single issue area.
- ▶ By participating in these convenings, companies and nonprofits would better understand who had similar goals and interests, gain a deeper understanding of the topic the root cause, and reduce duplication by having more consistent interactions.

DUPLICATIVE EFFORTS

Three of the groups addressed duplicative efforts, among other topics. In these discussions, the following themes emerged:

- ▶ Create a *shared understanding of where there is a great need and where less support is needed*. For instance, certain employee skillsets may be needed more often than others (like tech skills or product support).
- ▶ In order to really reduce duplication, we need *community-wide dialogue and accessible, shared research*.
- ▶ Shared research needs to include *experts on community engagement, gap analyses, and a clear focus on specific campaigns, issues, or organizations*.
- ▶ *Coalitions* around particular issues create more visibility among existing efforts and awareness of potential overlaps (for instance, the Mid Market Association).

COMMON CHALLENGES

Some participants specifically focused on the external and internal challenges in a nonprofit and company partnership. Key findings of this discussion were:

- ▶ A need for *standards of community engagement* for corporate social responsibility (similar to grantmaking standards). These standards would serve as benchmarks while pressuring companies to formalize their community engagement efforts and create accountability.
- ▶ A need for *appropriately allocated resources* in corporations and organizations that align with their goals for productive partnerships. This includes budgets, staffing, and capacity of the organization or company so that these efforts can receive appropriate attention and oversight. Managing a volunteer program at a nonprofit requires a great deal of staff time. Similarly, a company should be prepared to dedicate staff time and resources to its community engagement efforts.
- ▶ A need for *increased opportunities to learn from each other*.
- ▶ A need to create a *healthy competition among companies*. One group deemed this the “Tech Arms Race to Philanthropy” and another group envisioned a potential “Volunteer League,” structured similarly to a recreational sports league.

WHAT CAN WE DO NEXT?

The diversity, energy and thoughtfulness of the session's participants generated new ways of thinking about our challenges and many potential solutions. Below are just a few suggestions for how to translate these findings into action.

- ▶ **Clarify your needs and goals**
 - Gather your relevant stakeholders and form a collective understanding of what you need or what you have to offer (be specific and write it down!)
 - Create a “charter of engagement” that outlines your company’s or organization’s priorities, goals and areas of interest.

- ▶ **Increase your own transparency**
 - Post your resources/ needs, vision and ways to get involved on your website or share it on Facebook.
 - Create a menu of suggested ways to give back for employees and vet it with potential nonprofit partners.
 - Start your conversations with a meaningful discussion of expectations.

- ▶ **Build your understanding**
 - Build employee education by inviting guest nonprofit speakers or building knowledge around an issue area through a brown-bag luncheon.
 - Design your own partnership from scratch with an organization in another sector, without being constrained by conventional partnership models.
 - Research and read CSR reports and create a baseline of knowledge about corporate efforts.

- ▶ **Create your own access to initiatives and build coalitions**
 - Participate in or schedule a gathering of like-minded organizations or companies with a similar CSR focus around a cause or issue area.
 - Explore new ways of collaborating without requiring monetary resources (knowledge sharing, research collaborations, convenings, etc.).
 - Have more open conversations about impact, particularly outside the “pitch zone”.
 - Create a peer group.
 - Be proactive in connecting to partners through coffees and meetings.

- ▶ **Narrow your focus...**
 - Come together on a specific issue.
 - Research the root causes of issues and ways to get involved in addressing them.
 - Focus on deeper engagements, rather than a large number of one-off engagements.
 - Build a visual framework for what a sophisticated CSR program looks like at your company.

- ▶ **...And broaden your impact**
 - Approach your resources as a portfolio of offerings or needs
 - If you're entrepreneurial, launch the “Volunteer League!”
 - Be more upfront about a funnel of deepening engagement opportunities for volunteers.
 - Consider “giving” as a package (include your product, skills, space, talent, money, etc.).

And if you ever have questions, get stuck, or just need some motivation, reach out to an expert! Taproot Foundation provides direct pro bono service projects, corporate advisory services and field-building advocacy efforts to increase access to pro bono services for organizations serving our communities. By creating access to pro bono talent, we equip social organizations to better serve their constituents and create lasting social change.