Sustainability and Partnerships

Presented by Shelli Bischoff

MI Diabetes Prevention Network
Lansing, MI | July 28, 2016
INTRODUCTION

Purpose
▲ To help participants create more sustainable Diabetes Prevention Programs (DPP) and to identify and develop meaningful and productive strategic partnerships in support of diabetes prevention goals
• To introduce a concept of sustainability that is more than funding and partnerships
• To distinguish among types of partners and partnerships to enable more appropriate partner relationships

Learning Objectives
Participants should be able to:
▲ Define what sustainability means for their DPP or organization
▲ Articulate a comprehensive approach for sustainability
▲ Distinguish between types of partners and those most important to the sustainability of their DPP
▲ Create a partner relationship management plan for strategic partners

Agenda
2:15-2:30 Introduction, overview, interests
2:30-3:00 The integrated strategy for success and sustainability
3:00-3:30 Strategic partners, partner relations, partner relationship management plan
3:30-3:45 DPP applications
3:45-4:00 Conclusion—partners as “necessary but not sufficient” for sustainability

Your DPP
▲ What does sustainability mean to you?
• Why is sustainability important?
▲ How many partners do you have?
• How many can you manage at any one time to ensure productive and valuable relationships?
▲ Why are partners important to DPP outcomes?

This is a conceptual overview presentation. For deeper exploration, application and skill building, this material is available in a 1 hour webinar format, an expanded 4 hour format, a 1 or 2 day skill building session, or a customized consulting format.
SUSTAINABILITY

Definition
Having the human, financial, technological, and organizational resources to provide services to meet needs and attain results towards mission on an ongoing basis; requires the organizational infrastructure to carry out core functions independent of individuals or one-time opportunities.

The Three Questions

1. What exactly are we trying to sustain?
   ▲ What components of the program must be sustained?
   ▲ What is negotiable and what is non-negotiable?
   ▲ What are the core, indispensable functions?

2. How much will sustaining the program cost?
   ▲ What is a realistic and necessary budget?
   ▲ What are the actual costs to provide services?
   ▲ What is the minimum budget necessary and what is the optimum?

3. Does the environment support sustainability?
   ▲ What is the feasibility of funding for DPP?
   ▲ What are the community’s competing interests and needs?
   ▲ How does DPP align with organization or community priorities?
   ▲ Who are the influencers, and conversely, who are the naysayers?
   ▲ How big is our active and vocal constituency and how strong are our key partners?
### Worksheet: Sustainability Assessment

<table>
<thead>
<tr>
<th>Component</th>
<th>Answer</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td><strong>Identity</strong></td>
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</tr>
<tr>
<td>What impact does your organization/program make?</td>
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<tr>
<td>What is your distinct strategic focus?</td>
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<td>What are the three core outcomes you will achieve over the next few years?</td>
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<td>What is the single, consistent message?</td>
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<tr>
<td><strong>Constituents</strong></td>
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<tr>
<td>Who are your two or three core constituent (target markets) groups?</td>
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<tr>
<td>What are your core constituent’s values, attitudes, lifestyles, and behaviors relative to the program?</td>
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<tr>
<td>How do you reach and engage core constituents to lead to long-term engagement and support?</td>
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<tr>
<td>Who are your two or three key strategic partners?</td>
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<tr>
<td><strong>Capacity</strong></td>
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<tr>
<td>What are the core functions necessary to achieve strategic goals?</td>
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<tr>
<td>How do your systems and structures support your strategies?</td>
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<tr>
<td>What does each individual who sits on your committee, advisory group, or coalition bring to the table and why are they there?</td>
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</table>
INTEGRATED STRATEGY FOR SUCCESS AND SUSTAINABILITY

Align and Integrate

Identity

▲ **Focus:** your core, who you are
  - The difference you are trying to make, what you are in business to achieve
▲ **Position:** the place you occupy within a given niche
  - Defines the tables at which you sit
▲ **Repositioning:** realignment and adaptation to expand your niche and influence or to capitalize on emerging opportunities

A strong organization or program has an identity that is focused on results, meaningful connections with its constituents, and a business model that effectively attains and deploys resources to support identity and constituents.

Alignment of identity, constituents, and capacity builds impact. Impact assures success and sustainability.

What is the strategic focus and position of your DPP?
Constituents

▲ **Target markets**: those most likely to take action on your behalf
▲ **Marketing**: requires a deep understanding of the target market to be most relevant and resonant
  - Your target market defines your outreach, communication, and marketing strategies and messages

How do your constituents relate to DPP?

Capacity

▲ **Organizational development**: alignment of strategies, structures, staffing, systems (including leadership, management, governance)
  - Efficient and effective use of resources to facilitate the accomplishment of strategic goals
▲ **Business model**: how human, financial, and capital assets are organized to achieve goals and meet constituent needs, and the revenue model—how resources are generated and allocated
  - Implications of a contract model vs. a traditional philanthropic model
  - Consider social impact, social benefits, and social capital

What are the organizational and resource implications of sustained capacity?

Impact

▲ **Metrics of success**
  - Define the dashboard
▲ **Cohesive, comprehensive story**
  - Indispensable to your stakeholders, critical to the system
▲ **Impact = success = organizational stability and sustainability**

What are the 2 or 3 indicators on your dashboard?
The Business Plan Blueprint

A written blueprint is the document that demonstrates how the program or organization is integrated and aligned to ensure success and sustainability.

1. Introduction
   a. Purpose
   b. Process
   c. Overview and prefaces

2. Situation Analysis
   a. External analysis
   b. Internal analysis

3. Organization Description
   a. Vision, mission, goals
   b. Legal form and history
   c. Distinctive competence
   d. Strategic issues and focus

4. Markets
   a. Market analysis
   b. Market segments
   c. Target market profiles
   d. Competition

5. Products, Services, and Programs
   a. Core products, services, or programs
   b. Supporting products, services, or programs
   c. Value proposition

6. Outreach Strategies
   a. Marketing, communication, and public relations
   b. Direct contact, promotion, media (earned, paid, social), advertising

7. Strategic Partnerships
   a. Necessary partners and complementary strengths
   b. Partner relationship strategies

8. Organizational Development
   a. Leadership and governance
   b. Management and staffing
   c. Structure, systems, and processes

9. Finances
   a. Revenue model
   b. Projected income and expenses
**PARTNERSHIPS**

**Partnership:** An association with another individual, organization, group, or agency that exists in order to pursue a shared goal

**Partner relations:** A deliberate body of knowledge and skill set based upon multi-disciplinary best practices defining how partner relationships are created and managed

### Partner Relations Approach

<table>
<thead>
<tr>
<th>Traditional Approach</th>
<th>Partner Relations Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partnering for its own sake</td>
<td>Partnering as means to specific ends</td>
</tr>
<tr>
<td>Once our partner, always our partner</td>
<td>As outcomes are achieved, partners change</td>
</tr>
<tr>
<td>Any partner is a good partner</td>
<td>Cultivating partners strategically</td>
</tr>
<tr>
<td>Ad hoc systems and structures to support partnerships</td>
<td>Specific, deliberate partner relations systems and structures</td>
</tr>
<tr>
<td>Partner’s relationship is with an individual staff member</td>
<td>Partner’s relationship is with the section, division, or organization</td>
</tr>
<tr>
<td>Learning partnering “on the fly”</td>
<td>Learn from partner relations fields</td>
</tr>
</tbody>
</table>

### Key Concepts

▲ Working in partnership is (typically) necessary to achieve outcomes and systems change

▲ We work in partnership to:
  - Meet goals we cannot meet ourselves
  - Broaden or deepen reach
  - Supplement skills or fill gaps
  - Position or for enhanced public relations

▲ Partnerships are a *means to an end*, not an end in themselves

▲ The partners you are accustomed to working with may not be the right ones to help you achieve your goals

▲ While all partnerships may be important, not all partnerships are equal

▲ Sometimes partnerships end
Partner Relations Continuum

The location of a partnership along the continuum defines the type of working relationship and the extent of involvement and connection.

<table>
<thead>
<tr>
<th></th>
<th>Independent</th>
<th>Interdependent</th>
<th>Dependent</th>
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<tbody>
<tr>
<td><strong>Goals</strong></td>
<td>Mutual interests, separate goals</td>
<td>Work together on some goals</td>
<td>Goals developed and monitored together</td>
</tr>
<tr>
<td><strong>Structure</strong></td>
<td>Informal, unstructured, low connection</td>
<td>Some structure around a particular common issue</td>
<td>Defined, explicit structure to support common efforts, high connection</td>
</tr>
<tr>
<td><strong>Environment</strong></td>
<td>Completely separate working environments</td>
<td>Likely maintain separate environments and identities, with some overlap</td>
<td>Shared environment influences success</td>
</tr>
<tr>
<td><strong>Collaboration</strong></td>
<td>Exchange of information</td>
<td>Work together on discreet projects or tasks</td>
<td>Synergistic and complementary skills and assets</td>
</tr>
<tr>
<td><strong>Success</strong></td>
<td>Success is independent of the other</td>
<td>Success (or failure) is shared on team components</td>
<td>Success depends on the other</td>
</tr>
<tr>
<td><strong>Example</strong></td>
<td>Associations, Networks</td>
<td>Project teams, Coalitions</td>
<td>Strategic partners</td>
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</tbody>
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**Partner Segments**
Subsets of partners who have a similar purpose, profile, or characteristics relative to the program or purpose; categorizing partners for more effective management

*When We Say Partner, Do We Mean…*

<table>
<thead>
<tr>
<th>Common Segments</th>
<th>Description</th>
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<tbody>
<tr>
<td>Advisors</td>
<td>Those individuals and groups that provide insight, feedback, or advice; sometimes legislative- or funder-mandated</td>
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<tr>
<td>Contractors</td>
<td>Those individuals or organizations with whom you have a contract that governs a specific exchange of money for products and services</td>
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<tr>
<td>Coalitions</td>
<td>A structure, often used to organize partners around a common goal, issue, or project; sometimes called alliances or task forces</td>
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<td>Funders</td>
<td>Those agencies and organizations that provide financial resources to your agency or program</td>
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<td>Grantees</td>
<td>Entities to whom you provide funds to carry out specific activities toward your pre-defined outcomes</td>
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<tr>
<td>Influencers</td>
<td>Those individuals, agencies, or organizations that provide significant leverage or influence in helping to achieve your outcomes</td>
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<tr>
<td>Internal Customers</td>
<td>Those people and departments within the larger agency who you depend on or who depend on you</td>
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<tr>
<td>Stakeholders</td>
<td>Those who have an interest, or stake, in your work or outcomes (may include special interests)</td>
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<tr>
<td>Strategic Partners</td>
<td>A high-level type of partnership; interdependent, requiring an explicit, formalized relationship</td>
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<tr>
<td>Target Markets</td>
<td>Those groups of people who behave homogenously relative to the issue, and who are likely to take the desired action</td>
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Strategic Partnerships
A specific and defined type of partner relationship; interdependent, requiring an explicit and more formalized relationship

- Are deliberate and necessary to achieve goals
- Include an agreement between two or more entities stating that the involved parties will act in a certain way in order to achieve a common goal
- Must be deliberately defined, developed, managed, and monitored
- Usually make sense when the parties involved have complementary strengths
- About creating new value together, not simply an exchange
- Require active collaboration
- Require mechanisms (structures, processes, and skills) for bridging organization and interpersonal differences

The Partner Relations Plan
- In addition to managing the goal related work you do with your partners, you must attend to the partner relationship itself
- The amount and type of relationship building steps needed varies from partner to partner and depends upon the quality of the relationship and necessary outcome of the partnership
- An ad hoc approach to building the partner relationship leads to stagnation

Template
<table>
<thead>
<tr>
<th>Partner</th>
<th>Segment</th>
<th>Partnership Purpose</th>
<th>Necessary Outcome</th>
<th>Strategy</th>
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The Five Steps of Partner Relations
The five steps of partner relations are the same whether developing a relationship with a new strategic partner or deepening an existing relationship.

<table>
<thead>
<tr>
<th>Partner Relations</th>
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<tbody>
<tr>
<td><strong>1. Know Yourself</strong></td>
</tr>
<tr>
<td>▲ What you have to bring to the table as a partner (skills, time, resources, style, etc.)</td>
</tr>
<tr>
<td>▲ What you hope to get out of a partnership</td>
</tr>
<tr>
<td>▲ How the partner relationship function is integral to your operating model or systems</td>
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<tr>
<td><strong>2. Know Your Partner</strong></td>
</tr>
<tr>
<td>▲ Skills, styles, interests, temperaments</td>
</tr>
<tr>
<td>▲ Decision making authority and key players</td>
</tr>
<tr>
<td>▲ Goals, values, and priorities</td>
</tr>
<tr>
<td>▲ Presumed motivation, non-negotiables</td>
</tr>
<tr>
<td>▲ Likely congruence of interests</td>
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<tr>
<td><strong>3. Build the Relationship</strong></td>
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<tr>
<td>▲ Define goals and parameters</td>
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<tr>
<td>▲ Detail contributions and expectations</td>
</tr>
<tr>
<td>▲ Create an explicit agreement</td>
</tr>
<tr>
<td>▲ Build supportive systems, structures, and practices</td>
</tr>
<tr>
<td>▲ Ensure roles and relationships are consistent</td>
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<tr>
<td><strong>4. Manage the Partnership</strong></td>
</tr>
<tr>
<td>▲ Manage differences and conflicts openly</td>
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<tr>
<td>▲ Set clear decision making processes, communication protocols, etc.</td>
</tr>
<tr>
<td>▲ Use project management to organize work</td>
</tr>
<tr>
<td><strong>5. Evaluate and Adapt</strong></td>
</tr>
<tr>
<td>▲ Share information, data, and skills</td>
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<tr>
<td>▲ Regularly monitor progress toward goals, processes, and working relationship</td>
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<tr>
<td>▲ Identify problems and make corrections</td>
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<tr>
<td>▲ Reinvent stalled partnerships; let go of partnerships that don’t work</td>
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</tbody>
</table>
CONCLUSION

The “Litmus” Test
▲ Who would care if you went away? (so much that they would actively engage to ensure your existence)
▲ Are you investing as much time, commitment, energy, sincerity, resources in the partnership as you would want from your partner?

Key Concepts
▲ Creating sustainable organizations or programs is more than where the next grant comes from and which partner will pay
▲ To meet ongoing needs and have an impact, your attention to program sustainability is critical
▲ Partnerships are a means to an end
▲ Mutually beneficial, well-managed strategic partners can be powerful to achieving success
▲ NOT everyone needs to be a partner. You can have 1000’s of friends, but choose your “significant others” deliberately and invest in the relationship

Questions and Comments

How will you apply this to DPP?
RESOURCES

Website
Visit www.nonprofitimpact.com for more information, including the following articles:
▲ The Business Plan Blueprint
▲ Outcome-Driven Technical Assistance: From Process to Impact
▲ The Integrated Strategy for Success and Sustainability: The Impact Model
▲ From Strategic Planning to Strategic Positioning
▲ Beyond Marketing: Becoming a Constituent-Centered Organization

Webinars and Training
All of the above topics are available in a variety of training and consulting formats. See also http://conservationimpact-nonprofitimpact.com/services/training/

Blogs that May Be of Interest
▲ The Evolving Definition of Sustainability
▲ What Strategic Partnership Really Takes
▲ Rejuvenate, Refresh, Reinvent
▲ Social Marketing: A Fundamental Public Health Practice
▲ Does It Really Matter?

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www.facebook.com/ConservationImpactNonprofitImpact
Conservation Impact and Nonprofit Impact are client-centered practices of our mission-driven, B Corp certified company. We work to radically impact how organizations achieve results towards mission and achieve impact. We provide comprehensive planning, marketing, and organizational development consulting and training solely to nonprofits, public agencies, and foundations. Our practices focus on the conservation, environment, food systems, healthy living, and healthy aging sectors.

Founded in 1996, we have successfully completed more than 1,010 projects with 675 clients in 46 states and five countries. In all our work, we apply a comprehensive systems approach as defined in our Integrated Strategy. We have distinct expertise in strategic decision making, positioning, marketing, organization analysis and development, business planning, and sustainability.

For more information about our practices, our team, and our work, please visit us online at ConservationImpact.com and NonprofitImpact.com or call us at 303-223-4886.
Your impact is our mission.

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