Partnership Planning Tool

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There are four stages to developing a successful corporate partnership:

Establishing a basis for partnership

- Identifying potential partners
- Considering the benefits to and expectations and needs of both parties
- Evaluating organisational 'match' and resources required to sustain the partnership
- Identifying joint projects or objectives that the partners can accomplish together

Proposing a partnership

Developing a Partnership Proposal that includes:

- Outline of your organisation
    - Outline of the proposed project or work that the partnership might achieve
    - Outline of the specific benefits to the corporate volunteers in working with you
    - Describe the partnership model you are proposing and the inputs that would be expected from partners
- Approaching the potential partner to 'pitch' your proposal

Negotiating a partnership agreement

A partnership agreement may be as simple as a letter from one partner to the other or could be a formal contract or Memorandum of Understanding. It should clearly document:

- Roles and responsibilities
- Communication and reporting strategies
- Deliverables from all partners
- Goals, milestones and timeframes

Sustaining a partnership

- Maintaining communication
- Managing conflict
- Evaluating success
- Celebrating achievement

Are you corporate volunteer ready?

Which statements best describe your organisation's current reality?

Statement	Generally not true for us	Mostly true but could be stronger	Completely true for us
1. Our primary motivation for seeking to involve corporate volunteers is because we believe they have particular knowledge, skills and commitment we need to achieve our missions.			
2. As a matter of policy and practice, we seek to develop long-term partnerships with companies that extend beyond the volunteer involvement of their employees.			
3. We have clearly stated expectations of what we hope to achieve or receive through our relationships with corporations.			
4. We have clearly stated what we are prepared to offer to companies in return for their support.			
5. We are prepared to invest in an ongoing dialogue with companies about how best we can work together.			
6. We do or would welcome the personal participation of company senior managers on our board of directors and/or advisory committees.			
7. We are happy for top leaders of the company to call attention to the work of their employees as volunteers in our organisation in speeches, written reports or interviews.			
8. We give particular attention and visibility to our corporate volunteers and/or corporate partnerships in our annual report and/or on our website.			

Statement	Generally not true for us	Mostly true but could be stronger	Completely true for us
9. We are aware of the policies and procedures through which the companies with which we work (or seek to work) determine when and how to provide funds to support specific volunteer projects undertaken by their employees.			
10. At least one person on our staff has, as part of his or her job description, the responsibility for managing our relationships with companies.			
11. We are or would be happy to work with a team of corporate volunteers in planning, implementing and evaluating volunteer activities for employees from their company.			
12. We do or would welcome and actively seek to involve families of corporate employees, retirees from companies and their families as volunteers.			
13. We have a broad range of skill-specific volunteer opportunities available.			
14. We are prepared to provide information on our volunteer opportunities in a fashion that would make it easy for a company to communicate them to employees through the company internet or intranet, newsletters, email, public announcements and other ways that saturate the company.			
15. We are prepared to provide group volunteer opportunities that can be used for leadership development or team-building purposes.			
16. We are prepared to help volunteers relate their learning needs to specific volunteer jobs that will respond to those needs.			

Statement	Generally not true for us	Mostly true but could be stronger	Completely true for us
17. We are prepared to provide to companies information on the knowledge and skills that their employees have learned as volunteers in our organisation.			
18. We regularly sit down with the companies with which we work to get feedback on the experience their employee volunteers are having in our organisation, to address problems and to seek new opportunities to expand our work together.			
SCORING – count the number of responses in each column and put those totals in the appropriate boxes on this line.			

Worksheet 1 - Designing roles which 'add value'

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Questions to consider	*Your answers*
What sort of activities, skills and knowledge would 'add value' to the organisation and its services?	
What needs does your organisation have that are currently not being met?	
What else would you do if you had the time or resources?	
What else would you do if you had the right skills available to you?	
How could the core functions of your organisation be improved?	
What other organisational competencies does your organisation need to build?	
Which skills or new approaches would your staff and organisation benefit from learning most?	
How could you improve the quality of your internal activities and processes?	
How could you improve the quality of your services?	
What additional services would your clients value most?	

Worksheet 2 - Designing roles which meet the needs of your organisation

Questions to consider	Your answers
What is the mission/purpose of your organisation?	
What are the objectives of your organisation?	
What are the key functions that your organisation carries out, or needs to carry out, to achieve its objectives? (For example, fundraising is a key function.)	
What are the main components of these functions? (For example, the main components of fundraising could include direct mail, sponsorship, events.)	

Worksheet 3 - Designing roles which meet the needs of your organisation

Objective:			
Key function: *Example: Fundraising*			
Main work components	**'Value-add' role possibilities**	**Design features of the role**	**Skills and personal attributes required, or to be learned**

Position Description Template

Name of volunteer	
Position title	
Location of position	
Organisation name	
Name of department or unit	
Start date	
End date (if short term assignment)	
Hours and days required per week (if applicable)	
Reports to	
Role or project overview and purpose, and how it relates to the organisation's mission	
Key responsibilities	
Skills and experience	
Training requirements	
Benefits for the volunteer	
Benefits to volunteer's employer (if applicable)	
Other requirements of the role (e.g. induction training, police check, medical check, any other training required or special conditions (please describe))	
Volunteer manager signature	
Volunteer signature	
Date	
Date of review	

Planning Exercise

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1. What are the three or four most important things you learned today – about corporate volunteering, about working with companies, about your organisation, about yourself?

2. How can you apply what you learned today in your organisation?

3. As you think about how to put what you learned today to work for your organisation, what are the most important first steps to take in doing that? When can you imagine taking those steps?

4. With whom in your organisation and in what way and when do you want to share what you learned in today's workshop? Is there material to share with your colleagues? With your supervisor? With your board of directors? With current corporate partners?

5. What was the most challenging thing that you heard today, the thing that you cannot imagine happening in your organisation? Why?

6. Based on today, what longer-term changes might you consider making in the organisation?