
ROCHESTER AREA NONPROFIT CONSORTIUM

TAKING ACTION TO DEVELOP SHARED SERVICES PART II

HOSTS: BROOKE CARLSON, CONSORTIUM STRATEGIST



NORTH SKY
HEALTH CONSULTING

WELCOME & AGENDA

- Why are we here?
- Bonus: What is the plan for collaborative training in 2019?
- What have we accomplished since November?
- What should the work look like? (*Breakout by priority area: joint purchasing, IT, health insurance*)
- How should the plans be changed?
- What are the next steps?



WHY ARE WE HERE?

PURPOSE



PURPOSE

- Review proposed collaborative training schedule
- Learn about progress of action groups
- Review and provide feedback on action plans
- Take a deeper dive into one or more priority areas.

We know this work can be done – we are already making progress!

ABOUT THE CONSORTIUM

- Formed in 2017 to explore developing shared services to increase operational efficiencies within nonprofits
- Funded by the Otto Bremer Trust and Mayo Clinic
- Coordinated by Strategist

- Guided by an Executive Committee comprised of 8 local nonprofits:

Family Service Rochester

Ability Building Center

Zumbro Valley Health Center

Channel One

Families First

IMAA

Diversity Council

TBD

- Collectively identified initial priorities developed in November 2018: **Joint Purchasing, Health Insurance, and IT Tech Support**

INITIAL PLAN

Strategist, Brooke Carlson, charged with:

- Conducting a national scan of models from around US.
- Learning from numerous local, regional, and statewide organizations to gauge interest and refine focus.
- Evaluating feasibility of collaborative components with Executive Committee.
- Convening additional *Community Forums* to review findings and prioritize actions.
- ★ Guiding priority-specific action groups to develop 3 year action plans.



INTRODUCTIONS

At your table:

- Introduce yourself (name, organization, role)
- Share if you are new to discussions or how you've been involved in Consortium work so far
- Share one thing they are hopeful about related to shared services work



WHAT IS THE PLAN FOR COLLABORATIVE TRAINING IN 2019?

TRAINING SCHEDULE



OVERVIEW

- Collaborative effort between Minnesota Council of Nonprofits, Rochester Area Chamber of Commerce, Rochester Area Foundation, and Consortium
- Jointly sponsoring, planning, and implementing nonprofit trainings
- Incorporating input including learnings from Consortium discussions

PROPOSED SCHEDULE

- **March 21:** Training – Conflict Resolution (MCN)
- **April 18:** Training – Nonprofit Collaboration (MCN)
- **May 16:** Training – Grant Writing (RAF)
- **June (Date TBD):** Event – Board Match Event. Include Leadership Greater Rochester, Collaborative Leadership Fellows, The Commission (Chamber).
- **July 17 (Wed):** Training – Licensing, Professional Certifications (RAF leads)

PROPOSED SCHEDULE

- **August:** No coordinated trainings
- **September 19:** Training – Organizational Efficiencies (Chamber)
- **October:** No coordinated trainings – MCN Conference
- **November 21:** Training – Risk Management (Chamber)
- **December:** No coordinated trainings

Fees: \$35 for MCN or Chamber members; \$45 for non-members

DISCUSSION

- What is your feedback on this proposed schedule/set of topics?
- What topics re: licensing and professional certifications are of interest?
- For June “board match” event, are you interested in being on a committee?
- Ideas for potential trainers, contact Terri Allred.
- Consider responding to extended call for trainings/panels/presentations from Greater Rochester area for MCN Conference.

CONTACT INFORMATION

Additional comments/questions, contact:

Terri Allred

MCN Southeastern Regional Coordination

Email: tallred@minnesotanonprofits.org

WHAT HAVE WE ACCOMPLISHED SINCE NOVEMBER?

ACTION GROUPS

ACTION GROUPS

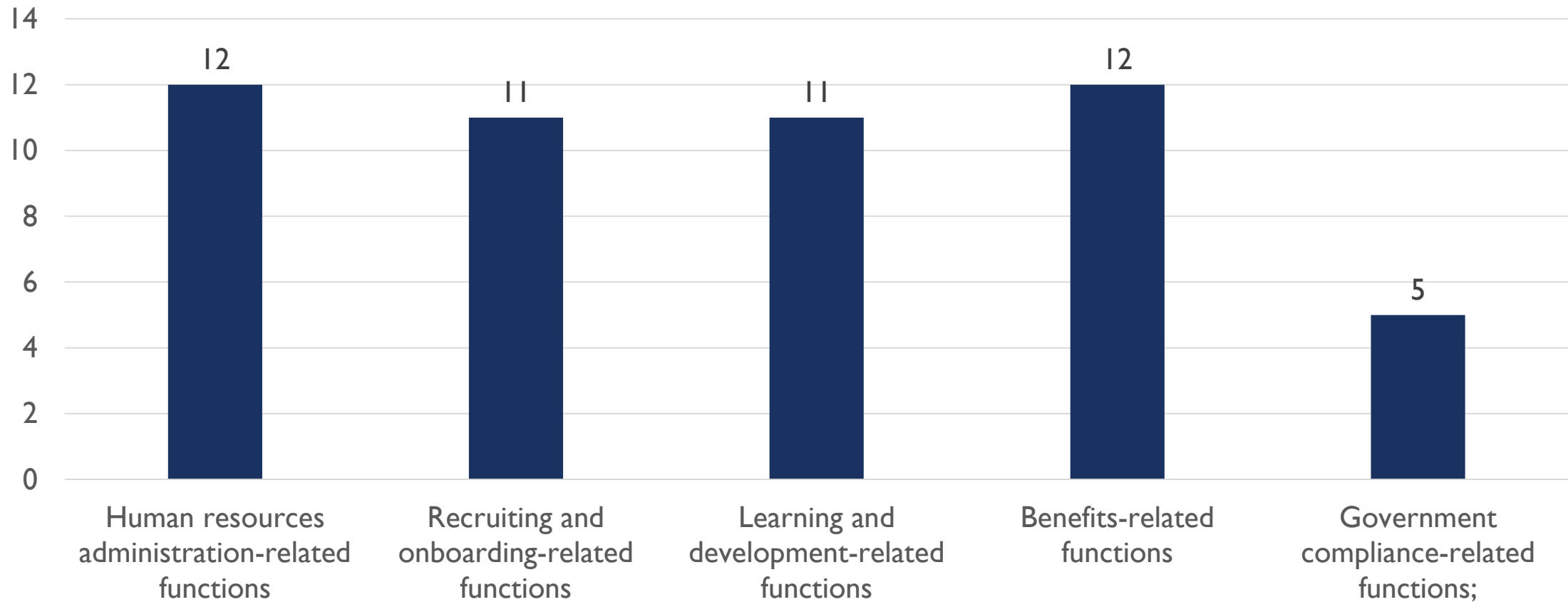
- Three Action Groups:
 - Joint Purchasing (7)
 - Information Technology (IT):Tech Support (9)
 - Health Insurance (7)
- Groups met three times to:
 - Discuss issues,
 - Collect/review additional data, and
 - Draft action plans

JOINT PURCHASING ACTION GROUP

- Identified Human Resources (HR) as focus; subgroup focusing on supplies
- Conducted survey about HR practices and needs (n = 29). Key findings include:
 - 55% needed some or significant support with HR functions
 - 52% are somewhat or very likely to invest resources in HR in next 6 – 12 months
 - 41% organizations indicated both a need for support and a willingness to invest resources
 - 53% were interested in either shared staffing, shared contracts, or either/both

JOINT PURCHASING ACTION GROUP

High Priorities for Your Organization



JOINT PURCHASING ACTION PLAN

Primary Focus: Human Resources

Goal: Increase support to local organizations in their human resources function by creating shared arrangements (staffing or contracts) and technical assistance opportunities.

Deliverables:

- Shared or jointly negotiated contract for human resources through an RFI and RFP process.
- Shared human resources staff (if deemed appropriate).
- Informal or formal technical assistance and networking opportunities.

JOINT PURCHASING ACTION PLAN

Secondary Focus: Goods and Supplies

Goal: Increase opportunities to reduce expenses related to goods and supplies.

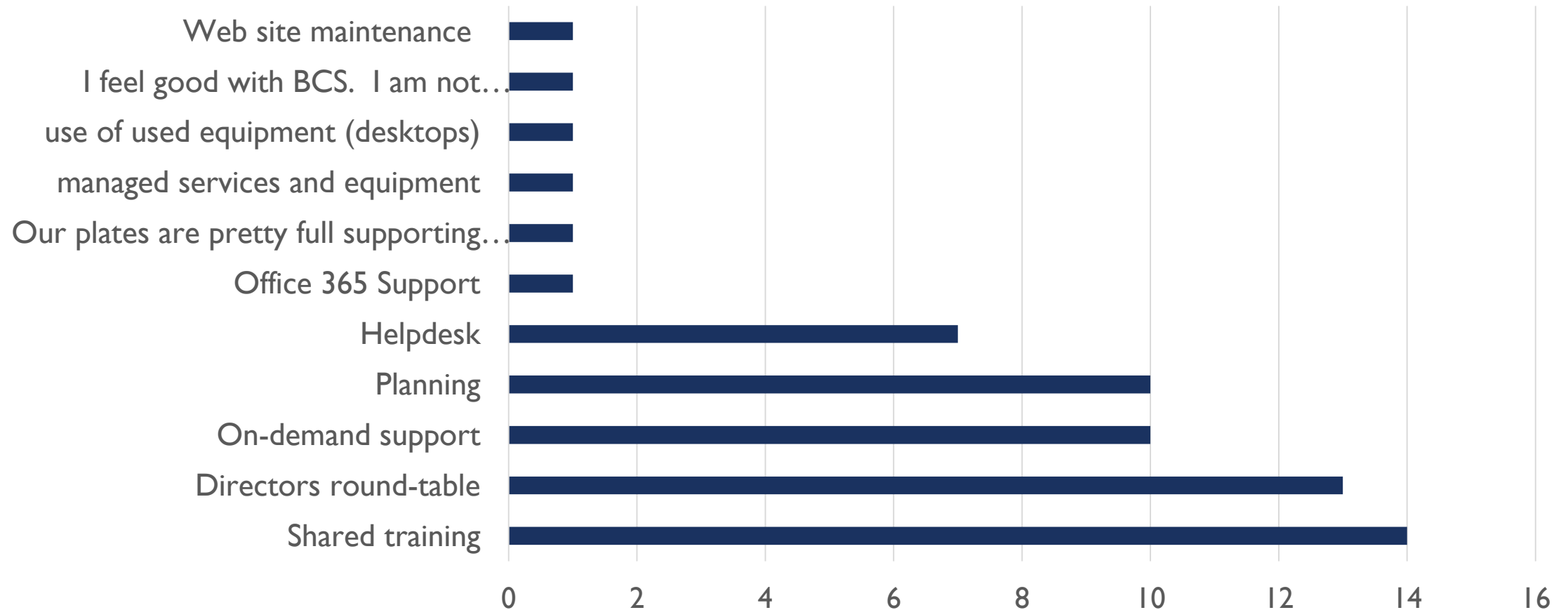
Deliverable: Options to reduce costs of goods and supplies.

IT ACTION GROUP

- Comprised of executive directors and IT experts
- Conducted survey about IT practices and needs (n = 27). Key findings include:
 - 56% needed some or significant support with HR functions
 - 41% organizations indicated both a need for support and a willingness to invest resources in IT in next 6 – 12 months
 - 63% organizations interested in shared staffing or shared contracts
 - 44% organizations indicated both a willingness to invest resources and an interest in either shared staffing or shared contracts

IT ACTION GROUP

Shared IT Services of Interest



IT ACTION PLAN

Goal: Increase support to local organizations in their IT functions by creating shared arrangements (staffing or contracts) and technical assistance and training opportunities.

Deliverables:

- Shared or jointly negotiated contract for IT services through an RFI and RFP process.
- Shared IT staff (if deemed appropriate).
- Knowledge sharing culture through informal or formal technical assistance, training, and networking opportunities (for organizations w/o IT expertise on staff).
- Informal or formal networking opportunities (for organizations with IT expertise on staff).

HEALTH INSURANCE ACTION GROUP

- Discussed challenges and past/current health insurance arrangements
- Compiled and reviewed initial list of alternative health insurance options. Examples include:
 - Association Health Plan (e.g. MCN, Alliance for Strong Families and Communities)
 - Self-Insured with Pooled Stop Loss Insurance
 - Employer Contribution (e.g. Gravie)
 - Professional Employer Organization (PEO) with Outsourced Human Resources
 - Government/School District Plan (Southeast Services Cooperative)
- Developed Action Plan with short and longer-term deliverables

HEALTH INSURANCE ACTION PLAN

Goal: Increase support to local organizations in accessing affordable, high quality health insurance.

Deliverables:

- Short term: Alternative health insurance options “tip sheet” with descriptions and considerations for nonprofits of varying sizes.
- Longer term: Adjusted health insurance rates for local nonprofits through discussions and negotiations with providers, insurers, and other potential organizations.



WHAT WILL THE WORK LOOK LIKE?

BREAKOUT SESSION: ACTION PLAN REVIEW AND FEEDBACK



BREAKOUT DISCUSSIONS

30 – 35 minutes

- Joint Purchasing (Front of Community Room) – Led by Matt Bissonette of Chamber of Commerce
- IT Tech Support (Back of Community Room) – Led by Steve Conners, Family Service Rochester Board Member
- Health Insurance (Downstairs Board Room) – Led by Kasi Haglund of Adapta

HOW SHOULD THE PLANS BE CHANGED

LARGE GROUP DEBRIEF

CHANGES TO ACTION PLANS

- **Overall Feedback**
- **Deliverables**
- **Timeline**

WHAT ARE THE NEXT STEPS?

2019 IMPLEMENTATION



NEXT STEPS

- Action Plan Implementation
- Trainings
- Communications Plan
- Late Spring/early Summer convening

CONTACT US!

For more information, questions, please contact:

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