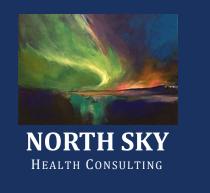
#### ROCHESTER AREA NONPROFIT CONSORTIUM

**EXPLORING SHARED SERVICES FOR AREA NONPROFITS: JULY 2018** 

PRESENTERS: SCOTT MALONEY, FSR, AND BROOKE CARLSON, STRATEGIST



## AGENDA

- Brief History of Consortium
- Overview of Progress
- Upcoming Opportunities for Engagement
- Q & A

HISTORY OF THE ROCHESTER AREA NONPROFIT CONSORTIUM

- Originally Greater Rochester Nonprofit Partners (GRNPP) (Est. 2010)
- GRNPP Work Group hosted forum "Committing to Impact: Exploring a nonprofit alliance in greater Rochester, MN." (March 2017)
  - Purpose: begin discussion of expanding capacity of nonprofit organizations by creating operational efficiencies, allowing more focus on mission.
  - 28 organizations participated and determined top priority as developing shared services for operational functions including:

Finance and Accounting	"Back Office"/Administrative
Building/Space	Health Insurance
Human Resources and Personnel	Information Technology (IT)

- Work Group identified several action steps and held initial meetings to learn more but determined more structure and staff support was needed.
- Established "Rochester Area Nonprofit Consortium" in place of GRNPP.
- Applied for and received Bremer Foundation funding for Strategist to implement action steps.
- Formed Executive Committee comprised of 8 local nonprofits to guide work of Strategist.

Family Service Rochester	Ability Building Center
Zumbro Valley Health Center	Channel One
Families First	IMAA
Diversity Council	NAMI SE MN

#### Strategist, Brooke Carlson, charged with:

- Researching effective models and components 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 work groups to develop 3 year action plans.

## PROGRESS

NATIONAL LANDSCAPE ASSESSMENT

## PROGRESS

- Developed a Landscape Assessment Plan that details steps to:
  - conduct a systematic scan of national models and
  - learn about needs and interests community.
- Researched 15+ communities around U.S. and identified several to follow up with.
- Established relationships with several organizations either working towards similar goals or currently offering shared services (e.g. MN Council of Nonprofits).
- Created a summary of findings with key learnings and advice for Rochester effort.

## KEY LEARNINGS

- Significant interest and momentum nationwide.
- Several organizations are either currently or will soon be offering shared services.
- Several models of shared services exist there is no "one size fits all".
- In many cases, new independent organizations formed to serve members and broader nonprofit community.

## KEY LEARNINGS

#### Organizational Models Vary:

- Members only
- Varied services based on membership type
- A la carte

#### Common Service Offerings:

- Half of new organizations provide information technology (IT) and human resources (HR).
- One-third administer benefits including health insurance.
- Others include: shared space/facilities, finance/payroll, and joint purchasing.
- Provision of Services: Provided by new organization's staff and its vendors

## KEY LEARNINGS: BENEFITS

- Time/Efficiency
- Cost Savings/Purchasing Power
- Quality of Programming/Services
- Networking/Coordination

## KEY LEARNINGS: ADVICE

- Involve executive leadership and decision makers early.
- Take time to build trust and establish a collaborative path forward.
- Compromise is foundation for success.
- Understand it may not work for every organization.
- Solidify shared values before shared services.
- Look for early "wins."

# UPCOMING OPPORTUNITIES

**WAYS TO GET INVOLVED** 

### OPPORTUNITIES TO GET INVOLVED

- EARLY AUGUST: Email with link to Webinar recording, Nonprofit Interest Survey, and Q & A
- MID AUGUST: Nonprofit Interest Survey to
  - Gauge interests and motivations for shared services and specific functions.
  - Identify organizations willing to participate in priority-specific development.
- AUGUST 22 and 29: Small Group Strategy Sessions at Rochester Area Foundation
  - Dive into more detail on topic areas and begin prioritization.

## OPPORTUNITIES, CONTINUED:

- MID-LATE SEPTEMBER: Large Group Forum
  - Provide a summary of findings from national and local assessments.
  - Continue prioritization process.
  - Serve as a nonprofit networking opportunity.
- OCTOBER-DECEMBER: Small Group Planning Groups:
  - Small work groups launched to begin developing priority-specific action plans.
- JANUARY 2019: Large Group Forum to review action plans.

## CONSIDERATIONS

- Work is multi-faceted and will allow for flexibility in what you access based on interests of your organization.
- Efforts to share services will be both beneficial to your organization and for greater community.
- Work is intended to increase how efficiently you operate and allow you to do what you do – better.
- Conditions in our community are right, the time to commit to taking action is now.
- NeedYOU to inform next steps!

Q + A

PLEASE SUBMIT WRITTEN QUESTIONS USING THE "CHAT" FUNCTION

## CONTACT US!

For more information, questions, or to join our mailing list, please contact:

#### **Brooke Carlson**

North Sky Health Consulting

brooke@northskyhealth.com

612.387.1183