

Developing and Managing Strategic Partnerships and Coalitions

Presented by:
Shelli Bischoff, MPA
President & CEO, Nonprofit Impact

NACDD/SOPHE Joint Academy and Annual Conference
May 2, 2011

Overview

Purpose

- To enhance the knowledge, skills, and ability necessary to develop, manage, and maintain partnerships that achieve health outcomes, particularly related to policy, environmental and systems change strategies

Learning Objectives

Participants will be able to:

- Reassess and redefine partnerships and coalitions relative to the current chronic disease situation, systems change strategies and desired health outcomes
- Segment and characterize partner segments and clearly distinguish between partners, stakeholders, and publics and identify and maintain strategic partnerships
- Create and maintain more effective and result-based coalitions and know when not to form coalitions
- Apply management skills and tools (communication, negotiation, project management and conflict management) to maintain effective partnerships and coalitions

Agenda

Time	Content
10:00 – 10:20	Introductions and course overview
10:20 – 10:30	Self-assessment and learning objectives
10:30 – 10:45	Definitions and frameworks
10:45 – 11:00	Systems change and planning as context
	<i>Break</i>
11:15 – 1:00	Segments, continuum, strategic partnerships Redefining partners
	<i>Lunch</i>
2:00 – 3:15	Developing and managing partnerships
	<i>Break</i>
3:15 – 4:15	Coalitions as structure; not as partnership Building and maintaining strong coalition
4:15 – 4:45	Management tools
4:45 – 5:00	Discussion, action steps, conclusion

Assessment

Primary Partners	Necessary Outcome	Quality of Relationship (1 bad – 5 excellent)	Time nurturing relationship (1 not enough – 5 too much)	Partner management strategies
1.				
2.				
3.				
4.				

Introduction



The Concept

- Great partnerships...
 - Your vision / image of a great partnership, either personal, business, professional?
 - Your role in making that partnership a great relationship?
 - How do you interact, respond, and adapt to make it work?
- Common characteristics of great partnerships
 - Probably not the formal, contractual arrangement that makes the partnership great as much as it is informal or unwritten processes (communication, compromise, mutual respect, etc.)
 - Differences between your acquaintances, your friends, and your spouse / family / soul mate?
 - *What is the same or different about this and public health partnerships?*

Overview

- Purpose of partnerships
 - To meet goals you cannot meet yourself (think team)
 - Broader reach
 - Supplement skills or fill gaps
 - Positioning and public relations
- Deliberate model
 - A partnership approach should be deliberately defined based on public health goals and the organization's business model
 - Systems, structures, processes must be aligned to support a partnership approach
- Partner relations
 - A deliberate body of knowledge and skill set
 - Partnership implies relationship and relationship implies two-sided
- Five steps to partner relationships
 1. Define your role and responsibility as a partner
 2. Deliberately identify and select partners
 3. Build the relationship
 4. Manage the partnership
 5. Evaluate the partnership and adapt

Frameworks



Definitions

Partnership: an association with another individual, organization, group, or agency to accomplish something together

Partner Segments or Categories: partner subsets; groups of partners who have similar purpose, profile, or characteristics relative to the program or purpose; categorizing partners for more effective management

Strategic Partnership: a specific and defined type of partner relationship; interdependent, requiring an explicit and more formalized relationship

Collaboration: a style of working with others that seeks to satisfy the needs of each party

Partner Relationship Management: (adapted from CRM) – refers to the methodologies and tools that help manage strategic partnerships in an organized way including:

- Processes that help identify and target best partners, and plan and implement campaigns with clear goals and objectives
- Processes that help form individualized relationships (to improve satisfaction) and provide the highest level of service to the most strategically significant partners
- Processes that provide the information to know partners' wants and needs, and build relationships

Teams: a group of people who come together to pursue a common goal (note: not all teams are partnerships and not all partnerships are teams); a coalition is one type of team

Public Health Stakeholder Terms

- **Target Markets:** Those groups of people who behave relatively homogeneously relative to the issue, who are most likely to take the desired action
- **Partners:** Those agencies, organizations, and entities that are necessary to achieve outcomes
- **Grantees:** Those to whom we provide funds to carry out specific activities towards outcomes
- **Publics:** Those groups of people, agencies, organizations, and entities with whom we must have positive relationships such that we can achieve outcomes; those with whom we must maintain a positive image
- **Influencers:** Those individuals, agencies, or organizations that provide significant leverage or influence in helping to achieve outcomes
- **Funders / Donors:** Those people and agencies that provide the resources to do the work
- **Internal Customers:** Those people and departments within the agency or organization that you depend on or that depend on you
- **Stakeholders:** Those who have an interest, or stake, in your work or outcomes (may include special interests)

Frameworks for Understanding Partner Relationship Management

- Public sector model
 - Coalitions, collaboration
 - Public participation / community involvement
 - Public-private partnerships
- Donor relations model
 - Donor stewardship
 - Investor-investee
- Marketing / customer relations model
 - Market segments and target markets
 - Customer relationship management
- Human relations model / human resources management model
 - Courtship to life-long bond
 - Motivation, potential, and growth
- Business model
 - Strategic alliances – tactical, strategic, integral
 - Joint ventures

- Common Themes
 - Interested in pursuing mutually beneficial goals
 - Combining energy to attain something that is greater than the sum of the parts
 - Requires commitment and management
 - Requires learning and growing together, as well as information sharing
 - Communication is key to success
 - Require both structure and process – informal and formal
 - Evaluation and importance of mid-course adaptation

Context: Systems Change and Health Outcomes



System

- System is the sum of all the parts which impact a particular outcome – multi-organizations; various subsectors; and the interrelationships among networks and sectors (i.e. public, private, nonprofit)
- System: An organization structured at a community, regional, state, national, or global level that engages many individuals in a collection of interrelated activities.
Change: A permanent and holistic modification of a policy or operational approach at one or more of these organizational levels that sustains the project's efforts
(www.americanlegacy.org/PDF/community_voices.pdf)

Systems Thinking

- Systems thinking inspired by theoretical biologist Ludwig von Bertalanffy in 1950s
 - Organisms are open to their environment and must achieve an appropriate relation with that environment in order to succeed; they must adapt to a constantly changing environment – feedback mechanisms are critical
 - Systems have inputs, processes, outputs, and feedback loops
 - All pieces are interconnected; dynamic equilibrium; change in one part requires equal and opposite change in another
 - Diverse systems are stronger
- The discipline of organizational development defines (organizational) systems change
 - The study of how individuals behave influences how groups behave, which influences organizational productivity and results (which influences community results)
 - Individuals – defined by ideas, attitudes, behaviors, motivations
 - Groups – interpersonal, social, recreational, professional, formal and informal
 - Organizations – the structure through which individuals and groups combine to conduct business and achieve specific goals
 - *Community – associations and affiliations, coalitions, partnerships, collaborations, alliances (the structure through which public health conducts its work)*
 - System as the collection of the whole and interactions within the environment

Comparing Activity- Program- System

	Activity	Program	System
Level	Individual or group	Organizational	Multi-organization Community-wide Impacts all aspects
Example: asthma	Asthma educators providing in home support	Asthma education training and certification programs	(incentive) Negotiate with State health insurers to reimburse for asthma case mgmt services
Example: healthy living (integrated)	Nutrition and exercise classes at the local rec center	YMCA provides after school fitness at all schools	(policy) Physical activity required at all elementary schools
Goal: sample	50% of the targeted population demonstrate healthy living habits for 1 year	Obesity decreased in school age children by 25% in school district x	Childhood obesity treated (and insured) as a chronic disease

Change in the Socio Ecological Model

Components	Tools for Change
Individuals	Social marketing Champions Reminders Rewards Incentives / disincentives
Interpersonal	Group tasks / goals Interpersonal dynamics Social networks Decision making Communication protocols Negotiation Role clarification
Organizational / Community	Capacity building Funding Leadership
Systems	Influencers Constituency building Sub-sector relationships and partnerships Community visioning, planning, goal setting Financial (tax incentives, costs) Political processes / structures / decision-making Public-private partnerships Resource allocations Regulatory Strategic alliances Public services
Policy	Stakeholder support Leadership Campaign planning

Characteristics of Systems Change

- Substantive
- In depth (go deep)
- Takes time
- Complex
- Dealing with many interlocking (entrenched systems)

Planning and Partnerships

Your strategic plan defines your partnerships- what are you going to achieve and who do you need to be successful?

- Plans as positioning tools – define why you are critical and indispensable
- Resource constraints – never enough money or staff to do the job
 - Must carefully define the job to be done
- Quixotic political environment, no certainties, intense scrutiny
 - Define yourself so others don't define you
 - All things to all people is nothing to no one
- Shift from partners as grantees, coalitions, communities etc. to strategic partners
 - Shift from hundreds of partners to more deliberate, defined partnerships
- Plans to guide the work and to ensure efficiency and effectiveness
 - From activities to results
- Plans necessary to guide organizational alignment – how do we organize for success
 - Form follows function – what will help facilitate the achievement of strategic goals

Good Plans

- Based on data and analysis
- Represents deliberate decisions and choices (i.e. what *not* to do)
- Defines target markets and who you will serve (not everyone)
- Developed by steering committee, not all stakeholders (and grant recipients who by definition cannot make *strategic* decisions)
- Role of health departments as leaders (setting the agenda) vs. facilitators
- Not an umbrella under which anyone adds their activity
- Requires alignment of systems and processes, i.e. partners and grantees

	Name	Definition	Example
Why ↑ ↓	Impact	What difference do we want to make	Eliminate health disparities related to chronic disease
	Goal / Outcome	What is achieved as a result of strategies and actions in specific, measurable, attainable, realistic, time-framed terms	Decrease prevalence of obesity by 10% among Black Floridians
	Objectives / Strategies	A program or group of activities that says how you will achieve a goal; not all things, but the best, most effective way	(systems change strategy) Insurers to cover medical counseling for obesity
How	Activities / Tasks	The primary activities that need to be completed to achieve the objectives	Do a systems analysis – problem, leverage points, Partner with black health organization / health disparities groups Etc.

Goals and Strategies

- Goals (outcomes)
 - Use imperatives to help focus
 - What must we do in order to be successful towards desired / necessary impact?
 - For each imperative, what is the outcome to be achieved?
- Strategies
 - Given
 - Community data and needs analysis
 - Goals
 - Target population
 - Best practice information
 - Limited resources...
 - What are the two or three most important, most significant, and best strategies to bring about results for target populations to achieve your goal?
 - *Note: policy, systems change and environmental change are NOT always the appropriate strategy*

Worksheet: Goals

Create ONE goal statement for your program.

- Is this an outcome?
- Does it define the “win”?
- Is it measurable? (Doesn’t have to be quantifiable.)
- Is it specific enough to define appropriate strategies; and to define what NOT to do?

Sample Template

By Goal: (Health Outcome)

Strategy (objective)	Critical Tasks / Agency	Critical Tasks / Partner	Milestones or Deliverables / Date Due

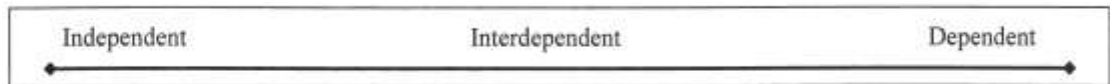
Example

Goal	Objectives	Primary Strategies (2 or 3)	Agency Tasks	Partner Tasks
<p><i>Reduce asthma hospitalizations and emergency care in the disparate community by X %</i></p>	<p>In 2-4 high priority areas, (help to) create a more effective patient-centered primary care system to ensure the disparate asthma population has access to care (as an alternative to hospital and emergency departments)</p>	<ul style="list-style-type: none"> • Create internal (health department) strategic partnerships • (Re) create a strong nonprofit asthma partner with significant resource development (beyond grantwriting) capabilities • State to focus on diverse government grant sources / partner on private sources of (nontraditional) funders • Re-design messages for asthma as significant issues for disparate community health (and social justice) issues 		

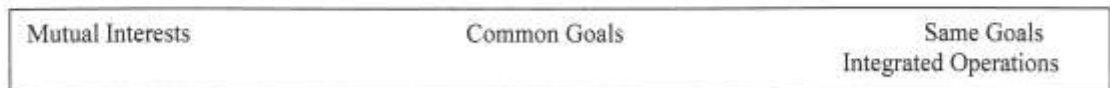
Types of Partnerships and Strategic Partnerships

Partner Relationship Continuum

Relationship



Synergy



Structure / Connection



Examples

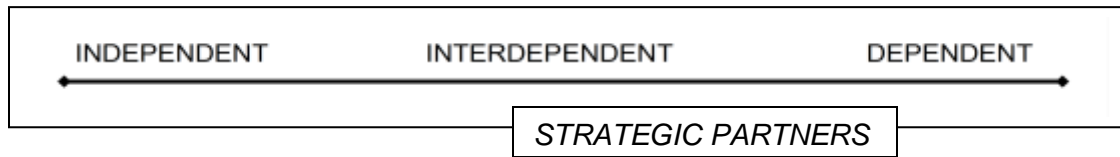


Description

Environ.	Totally separate working environments	Likely to maintain separate environments and identities, with some overlap	<i>Shared environment influences success</i>	Cultures / environment merge or meld
Collabo-ration	Exchange of information	Work together are discreet projects or tasks	<i>Synergistic and complementary skills / assets</i>	Fully integrated systems and operations
Goals	Shared interests but separate goals	Work together on some shared goals	<i>Goals developed together</i>	One set of goals
Success	Success independent of other	Shared success or failure on team components	<i>Success depends on other</i>	Success and failure is one and the same

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

Strategic Partners



Strategic Partnership: a specific and defined type of partner relationship; interdependent, requiring an explicit and more formalized relationship

- Strategic partnerships
 - Are deliberate and necessary to achieve public health goals and outcomes given the current context
 - Includes 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
 - Cut across types / segments of partners. For example, some contracts / advisory groups, etc. are more strategic than others
- Usually make sense when the parties involved have complementary strengths
 - About creating new value together, not simply an exchange
 - Requires active collaboration
 - Requires mechanisms (structures, processes, and skills) for bridging organization and interpersonal differences
- Not all partnerships are strategic partnerships
 - You may have strategic partners in any segment

Be clear about purpose of partnership and define relationship accordingly.

Segmentation Sample

Segment	Description	Primary Role	Type of Relationship	Process
Contractors	Hired in lieu of staff for specific expertise to carry out a defined set of tasks and produce specific products	By specific scope of work and contract	Contractual	Managed and held accountable by lead staff
Grantees	Receive grants to further health outcomes	By grant application and award	Grants management	Held accountable to grant requirements
Advisors	Hold critical information or expertise necessary to complete work	Advise and guide policies and practices	Advisory	Typically in form of committees and meetings, but could be more deliberate and systematic
Implementers	Those entities necessary to carry out tasks; work is considered integral to what they already do or why they exist	Perform specific duties through ongoing work on behalf of organization	Generally informal relationships but could be more formal	Less formal, but needs more explicit definition
Community Networks	Those entities or individuals who have specific connections in the community or with a population to be influential	Outreach arm of the organization or agency	Advisory and potential implementers	Very fluid, need more definition
Oversight	Assigned by law, grant, or regulation to oversee and regulate activities	Oversight or regulation	Compliance	Structured
Advocates	Related to work; vested interest or agenda to be met	Supports a particular interest or position	Informal	Generally reactive or in planning processes
Other				

Building Strategic Partnerships



1: Know Yourself. Be a good partner; then get a good partner.

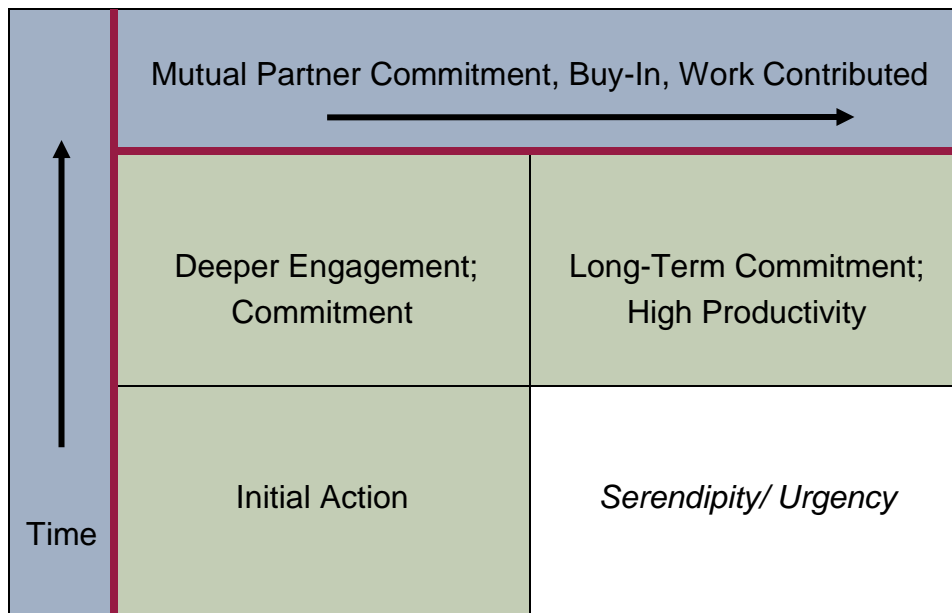
- Your partnership model
 - Understand where and how partnerships fit the public health business model
 - Define purpose and intended results
 - Be explicit about parameters or guidelines
- Your value added
 - Know yourself
 - Strengths / weaknesses
 - Styles
 - Obstacles / opportunities
 - Constraints / assets
 - Operating environment
 - Contribution
 - Skills, knowledge, expertise
 - Access to information
 - Surveillance and evaluation of the whole
 - Financial resources
 - Other
- Role and Responsibility
 - Define outcomes and expectations
 - Time and energy
 - Be clear that public health can deliver / maintain their part of the relationship... or do not enter into that relationship

2: Know Your Partner

- Define partnership purpose
 - Define what you need from a partner that you cannot, or should not, do alone
 - Define goals, milestones and outcomes
 - Be explicit about expectations
- Selecting partners
 - Current relationships
 - Informal networks

- Formal networks
- Non-traditional sources
 - Marketing approach – research
- Understand partner needs
 - Know whether you can meet the needs
 - Ensure congruency between self and partner
 - Money as compared to technical assistance
 - Empowerment as compared to prescriptions
 - Respect as compared to paternalism
 - See customer / supplier exercise worksheet
- Assess style / culture / environment for appropriate fit and working relationship
 - Values
 - Style
 - Culture

3: Develop Relationships



- Relationship building techniques must be appropriate to stage of relationship
 - Deliberate techniques are used to build towards commitment
- Building relationships is hard work
- It takes time and energy and deliberate attention

Stage	A Human Relations Model	A Customer Relations Management Model
1	<ul style="list-style-type: none"> • Courtship <ul style="list-style-type: none"> ▪ Build trust ▪ Build credibility ▪ Get to know each other; discover compatibility 	<ul style="list-style-type: none"> • Know your partner <ul style="list-style-type: none"> ▪ Key players ▪ Skills, styles, interests, temperaments ▪ Decision-making authority ▪ Program implementation ▪ Motivation, non-negotiables
2	<ul style="list-style-type: none"> • Engagement <ul style="list-style-type: none"> ▪ Meet the family ▪ Define mutual interests and dreams 	<ul style="list-style-type: none"> • Define goals and parameters <ul style="list-style-type: none"> ▪ Outcomes ▪ Contributions and expectations ▪ Explicit agreement
3	<ul style="list-style-type: none"> • Setting up housekeeping <ul style="list-style-type: none"> ▪ How we will work together ▪ What it looks like ▪ Accommodating and compromising 	<ul style="list-style-type: none"> • Consider your partner in everything you do <ul style="list-style-type: none"> ▪ Systems, structures, and practices to support the partnership ▪ Roles, relationships are consistent
4	<ul style="list-style-type: none"> • Bridging differences <ul style="list-style-type: none"> ▪ Learn how to deal with conflict ▪ Discover and navigate differences and opportunities ▪ Protect integrity of the relationship 	<ul style="list-style-type: none"> • Manage the relationship <ul style="list-style-type: none"> ▪ Manage differences and conflicts openly ▪ Clear decision-making processes, communication protocols, etc.
5	<ul style="list-style-type: none"> • Old married <ul style="list-style-type: none"> ▪ Realize how you've changed internally as a result of the relationship ▪ Deeper understanding and appreciation ▪ Stronger together and separately ▪ Legacy – how to pass along 	<ul style="list-style-type: none"> • Learn how to learn from each other <ul style="list-style-type: none"> ▪ Share information, data, skills ▪ Regular evaluation: monitor results, successes, problems; make corrections

Applies to deepening / fine-tuning an existing relationship as well as to developing a relationship with a new strategic partner

4: Manage the Partnership - A Project Management Approach

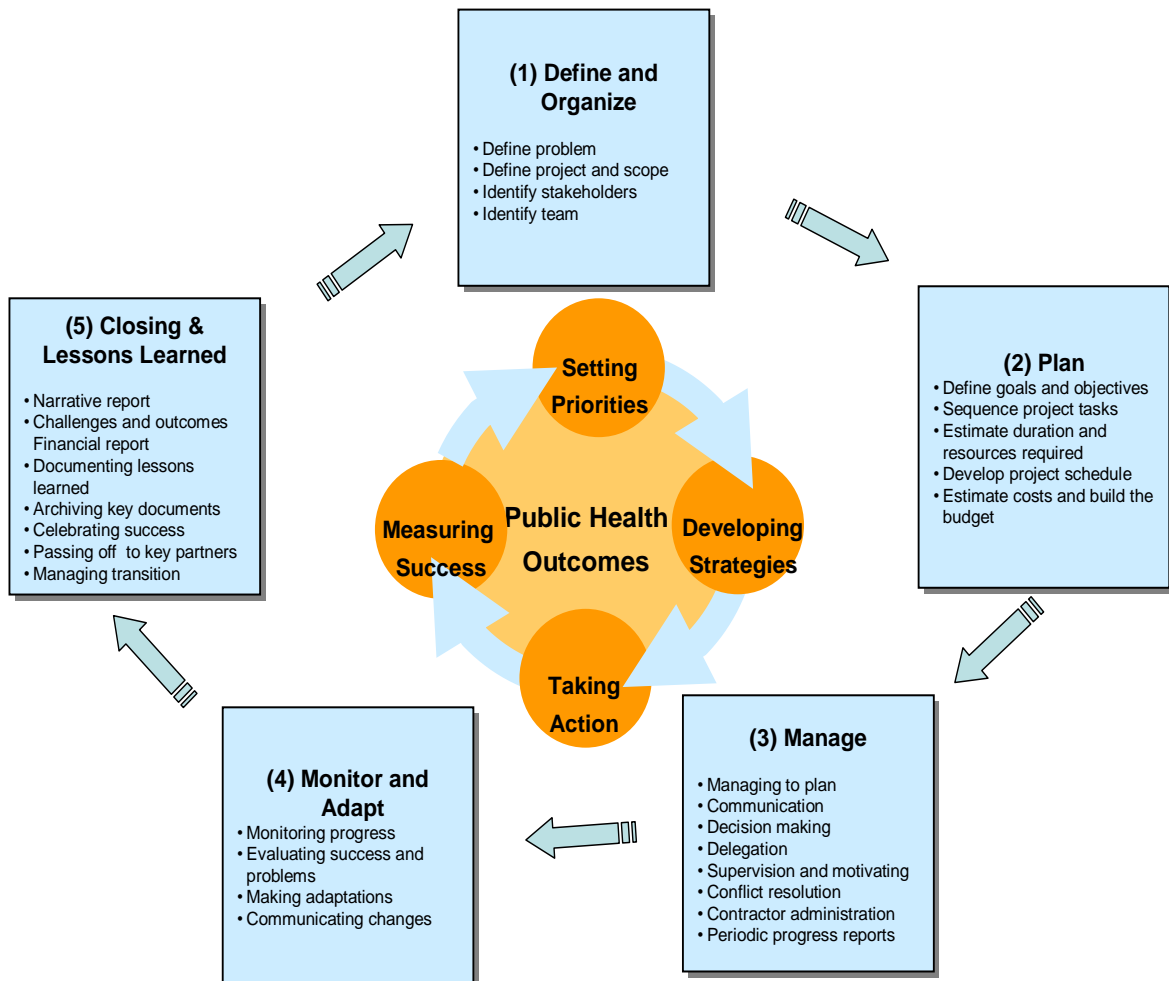
Project Management

Allocation, tracking, and utilization of resources to achieve a particular objective within a specified period of time towards defined goals

Project

A set of activities that aims to produce a unique deliverable and time bound with a beginning and end

The Project Management Cycle



Nonprofit Impact offers a course on Project Management for Public Health Professionals. Contact us for additional information at 303.223.4886

The Public Health Project Plan

- **Tasks:** define and sequence the activities to complete the project and define relationship among tasks
- **Time and schedule:** allocate time and duration for each task
- **Responsibility:** identify human resources / competencies for task completion
- **Resources:** identify financial or other resources for task completion
- **Progress:** identify specific milestones, products or deliverables for each task

Sample Project Plan Template

Project Goal:						
Task#	Task	Start Date	End Date	Duration	Responsible	Resources Needed
1.1						
1.2						
1.3						
1.4						

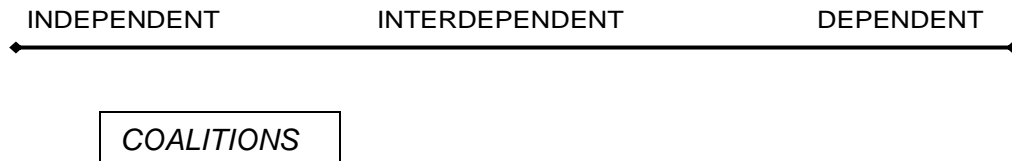
5: Evaluate and Adapt Partnerships

- Monitor status of strategic partnerships regularly
 - Progress toward goals
 - Processes and working together
 - Address any issues; identify benchmarks for coming year
- Adapt when partnerships don't work
 - Purpose or goals are not clear
 - Working with partners is not necessary to achieve your goals
 - Partners bring no added value
 - You have nothing to bring to the partnership
 - Unequal expectations (i.e. they do all the work, you get all the credit / money)
 - Distracts or diffuses the distinct role of public health or abdicates the agency / organization's responsibility
 - No time / energy / focus to build the relationship and manage the partnership

- Reinventing stalled partnerships
 - Recalibrate around common goals
 - Understand expectations
 - Be explicit about strengths and value added
 - Be objective / honest about what didn't work
 - Rebuild trust by working together
- Ending Partnerships (I like you as a friend...)
 - Be clear and explicit...and maintain dignity
 - Define current situation objectively
 - Reframe relationship moving forward

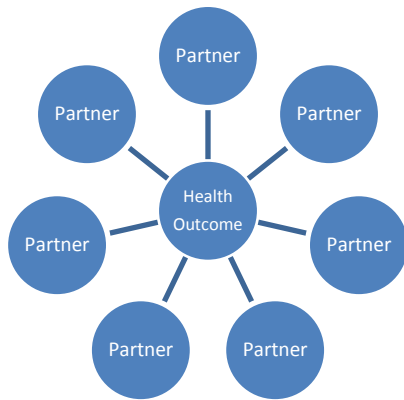
Evaluate current strategic partnerships. What needs to be adapted or changed?

Coalitions



Coalitions are a structure to organize a group of strategic partners, but there is typically a strategy / structure disconnect. We want / need interdependence, but coalitions are often a group of independent players.

Coalition as Structure



- As Structure
 - A way to organize partners around a common goal or project
 - Coalitions, alliances, or task forces are a means to an end. The coalition is not the end in itself.
 - The whole should be greater than the sum of the parts
 - Often used for a specific one-time campaign, which requires many voices coming together to speak as one or the strength of the whole
 - Also used when funders require a collaborative approach on a project

- Leadership / Governance
 - Typically a core group or steering committee that represents some or all of the partners
 - Staff generally reports to the steering committee or a core group
 - Staff serves as the coordinator of all the parts

- Authority / Decision making
 - Typically by some appointed / self-selected smaller group of the steering committee such as an executive committee

- Opportunities / Constraints
 - Builds a broad and sometimes diverse network of players, providing flexibility or reach. Assumes full and sometimes equal participation of all. However, partners may operate independently and at varying levels.
 - Rules of engagement are generally less defined and more fluid (to try to engage everyone) though they do not need to be
 - Partner participation, commitment, and investment vary. Groups usually play nicely together until there is money to be allocated.
 - Without clear definition and roles, accountability is difficult as all players are independent
 - Often used to try to decrease competition and to unite around common purpose
 - *Collaborative efforts work best when partner roles are very clearly defined and there is high accountability to results* – which is difficult to get if there is no real incentive (i.e. funds) for participation and partners may be at all different levels of capacity, skill, or interest
 - Public agencies tend to like the concept of collaboration and networks, but they are not always the best or right structure – depending on the outcomes to be achieved and the working environment

Worksheet

Building an Effective Coalition

- What is the purpose of your coalition?

- What *must* the coalition accomplish in the next 12 to 18 months?
 - Two or three goals, not all the activities!

- Who *must* be part of the coalition in order for it to be successful in bringing about change in this community?

- What are the specific responsibilities of coalition members and how will they be held accountable for carrying out those responsibilities?

- Whose role is it to ensure the coalition functions as a team in which the whole is greater than the sum of the parts?
 - Note: meetings do not create teams, and teams are more than a group of people working together on a task

- Do coalition members understand their role in creating loyal, engaged constituents towards specific community results? And do they have the power, influence, and skills to do so?

Management Tools



Communication

- Create common language
 - Understand styles
 - Define expectations, i.e. how often
 - Define terms and language
- General Rules
 - Information is not communication
 - Define communication protocols
 - Who gets communicated to about what?
 - Define communication etiquettes
 - Email standards
 - Prevent communication obfuscation
 - Keep focused on what is appropriate for communication
 - Understand and respect different styles
 - Such as DiSC (dominant, influencing, steady, compliant) – see table below
- To Improve Communication
 - Understand barriers
 - Follow up – be explicit
 - Regulate information flow
 - Utilize feedback and active listening
 - Simplify language
 - Pay attention to timing
 - Be repetitive and consistent
 - Be honest!

DiSC Dimensions

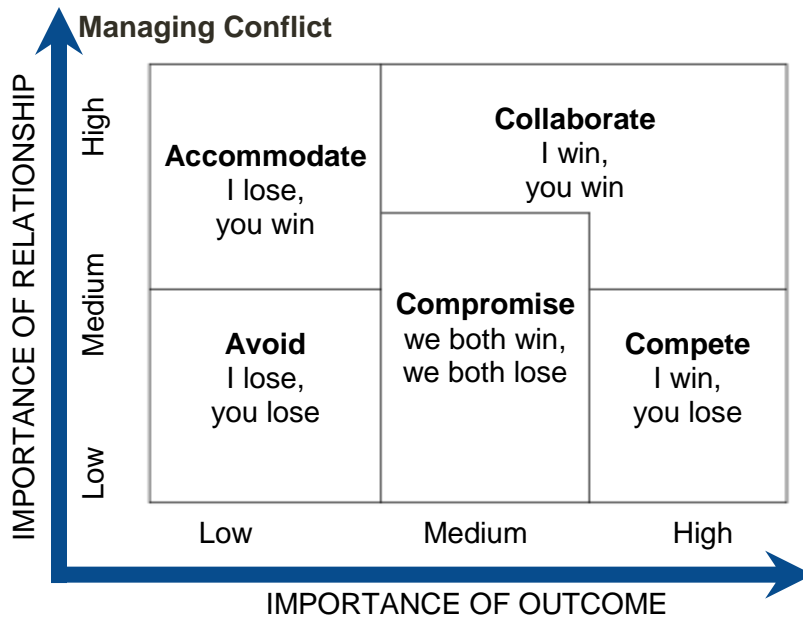
The table below gives an overview of all four DiSC® dimensions. Read all the dimension descriptions to better understand others who are like and unlike you.

D DOMINANCE		i INFLUENCE	
Emphasis is on shaping the environment by overcoming opposition to accomplish results.		Emphasis is on shaping the environment by influencing or persuading others.	
<p>DESCRIPTION This person's tendencies include</p> <ul style="list-style-type: none"> getting immediate results causing action accepting challenges making quick decisions questioning the status quo taking authority managing trouble solving problems <p>This person desires an environment that includes</p> <ul style="list-style-type: none"> power and authority prestige and challenge opportunities for individual accomplishments wide scope of operations direct answers opportunities for advancement freedom from controls and supervision many new and varied activities 	<p>ACTION PLAN This person needs others who</p> <ul style="list-style-type: none"> weigh pros and cons calculate risks use caution structure a predictable environment research facts deliberate before deciding recognize the needs of others <p>To be more effective, this person needs</p> <ul style="list-style-type: none"> to receive difficult assignments to understand that they need people to base techniques on practical experience to receive an occasional shock to identify with a group to verbalize reasons for conclusions to be aware of existing sanctions to pace self and to relax more 	<p>DESCRIPTION This person's tendencies include</p> <ul style="list-style-type: none"> contacting people making a favorable impression being articulate creating a motivational environment generating enthusiasm entertaining people viewing people and situations with optimism participating in a group <p>This person desires an environment that includes</p> <ul style="list-style-type: none"> popularity, social recognition public recognition of ability freedom of expression group activities outside of the job democratic relationships freedom from control and detail opportunities to verbalize proposals coaching and counseling favorable working conditions 	<p>ACTION PLAN This person needs others who</p> <ul style="list-style-type: none"> concentrate on the task seek facts speak directly respect sincerity develop systematic approaches prefer to deal with things instead of people take a logical approach demonstrate individual follow-through <p>To be more effective, this person needs</p> <ul style="list-style-type: none"> to control time, if D or S is low to make objective decisions to use hands-on management to be more realistic appraising others to make priorities and deadlines to be more firm with others, if D is low
C CONSCIENTIOUSNESS		S STEADINESS	
Emphasis is on working conscientiously within existing circumstances to ensure quality and accuracy.		Emphasis is on cooperating with others within existing circumstances to carry out the task.	
<p>DESCRIPTION This person's tendencies include</p> <ul style="list-style-type: none"> adhering to key directives and standards concentrating on key details thinking analytically, weighing pros and cons being diplomatic with people using subtle or indirect approaches to conflict checking for accuracy analyzing performance critically using a systematic approach to situations or activities <p>This person desires an environment that includes</p> <ul style="list-style-type: none"> clearly defined performance expectations values on quality and accuracy reserved, business-like atmosphere opportunities to demonstrate expertise control over those factors that affect their performance opportunity to ask "why" questions recognition for specific skills and accomplishments 	<p>ACTION PLAN This person needs others who</p> <ul style="list-style-type: none"> delegate important tasks make quick decisions use policies only as guidelines compromise with the opposition state unpopular positions initiate and facilitate discussions encourage teamwork <p>To be more effective, this person needs</p> <ul style="list-style-type: none"> to plan carefully to know exact job descriptions and performance objectives to schedule performance appraisals to receive specific feedback on performance to respect people's personal worth as much as their accomplishments to develop tolerance for conflict 	<p>DESCRIPTION This person's tendencies include</p> <ul style="list-style-type: none"> performing in a consistent, predictable manner demonstrating patience developing specialized skills helping others showing loyalty being a good listener handling excited people creating a stable, harmonious work environment <p>This person desires an environment that includes</p> <ul style="list-style-type: none"> maintenance of the status quo unless given reasons for change predictable routines credit for work accomplished minimal work infringement on home life sincere appreciation identification with a group standard operating procedures minimal conflict 	<p>ACTION PLAN This person needs others who</p> <ul style="list-style-type: none"> react quickly to unexpected change stretch toward the challenges of accepted tasks become involved in more than one thing are self-promoting apply pressure on others work comfortably in an unpredictable environment help prioritize work are flexible in work procedures <p>To be more effective, this person needs</p> <ul style="list-style-type: none"> to be conditioned prior to change to validate self-worth to know how personal effort contributes to the group effort to have colleagues of similar competence and sincerity to know task guidelines to have creativity encouraged

(Source: DiSC Classic 2.0, Center for Internal Change, Inc.)

Conflict Management

- Principles of positive conflict management
 - Build winners (voting builds losers)
 - Declare a moratorium
 - Encourage equal participation
 - Actively listen
 - Separate fact from opinion
 - Separate people from the problem



Each dimension and style is useful depending on the situation. No one style is best. It is useful to be able to draw from each style and to adapt to the particular situation.

Conflict Management Styles: Definitions and Examples

Style	Definition	Appropriate to Use...
Avoiding	Neglect one's own concerns and those of others by not addressing the conflict	When issues are trivial or only symptoms of a deeper issue
Accommodating	Seek to satisfy the other person's concerns at the expense of one's own	When the issue is more important to others than it is to you
Competing	Seek to satisfy one's own needs at the expense of the other	When the issue is vital to the organization's welfare or core values
Collaborating	Seek to work together to find a solution that fully satisfies one's own concerns and those of the other	When both parties' concerns are too important to compromise
Compromising	Seek an expedient middle ground that provides partial satisfaction for both parties	When under time pressure or when both parties are equally committed to their goals

(Source: Kilmann & Thomas)

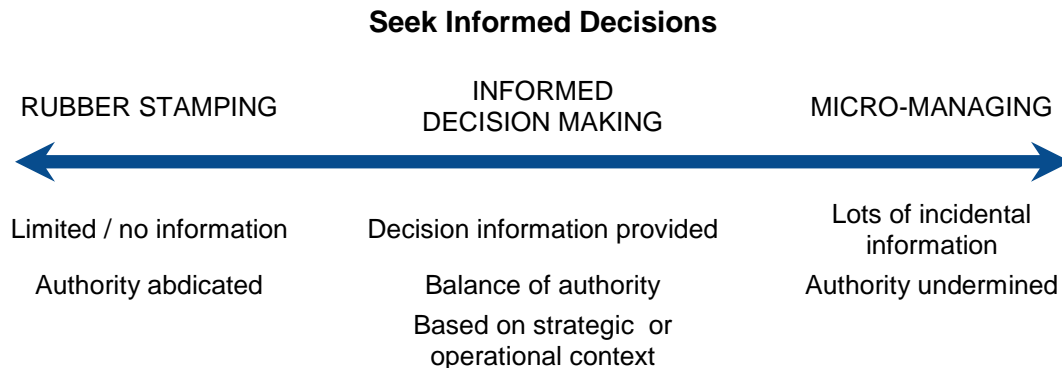
Decision Making

Decisions stick when they are:

- Officially documented
- Communicated to all relevant persons
- Respected and only revisited when necessary
- Made with informed thinking, using consistent criteria

Styles of Decision Making (be consistent)

- Autocratic 1: make decision alone
- Autocratic 2: seek relevant facts, obtain info, not advice, make decision alone
- Consultative 1 on 1: get advice and recommendation, make decision alone
- Consultative Group: collective advice and recommendations, make decision alone
- Group: group concurs on a decision



General Guidelines

<u>Individual Decisions</u>	<u>Group Decisions</u>
Simple	Complex
Doesn't impact others	Impacts others
Clearly specialized	Would benefit from broad expertise
One person is recognized as expert	Others can contribute or learn from
Crisis	Less urgent
Time constrained	Needs others for implementation

Change

Leverage Points for Change (Where you can impact the system; in order of impact)

- Leadership
 - Behavior of the people in power
- Rewards
 - Compensation (formal and informal)
 - Consequences and repercussions
- Management skills
 - People and management skills, i.e. conflict management, communication
- Team building
 - Team members influence each other's work
- Strategy / structure fit
 - How design facilitates accomplishment of strategic goals
- Culture
 - Operating values and philosophy, how we act, not just what we say

Change vs. Transition

- Change is the situation imposed on us by forces outside ourselves
- Transition is the internal psychological process we go through to adapt to change
- Must go through endings and neutral zone to get to new beginning

Five Steps to Managing Change

1. Establish the need for change
2. Design a change that effectively answers that need
3. Identify the impacts of the planned change
4. Plan how the changes will be implemented
5. Implement the changes

Getting through the Wilderness / Neutral Zone

- Help people understand personal transitions as response to organizational change
- Mourn endings and celebrate beginnings
- Be aware of individual transition processes
- Set specific do-able tasks
- Take one step at a time
- Carefully define behavioral expectations
- Acknowledge positive behaviors

(The concepts in this section are adapted from W. Bridges.)

Appendix: Strategic Plan Template



Situation Analysis

- Needs analysis
- Relevant data and information
- Target market data, demographics, psychographics
- Institutional landscape

Strategic Issues / Decisions

- Fundamental decisions i.e. focus, target markets, innovative or traditional

Impact / Mission

- What difference must we make, why do we exist?

Vision

- Descriptive, visual image of what it looks like when you are successful

Imperatives

- Those things you must do, to the exclusion of all else, to be successful moving forward

Goals / Health Outcomes

- Specific, detectable, realistic outcomes / results – what you will accomplish?

Strategies / Objectives

- How you achieve goals – the few overarching strategies (not all the tasks) towards outcomes
- How do best practices inform our choice of the best strategy?

Implementation

- Who is responsible and accountable for implementation?
- What are the governing leadership and management authorities and responsibilities?

Action Plan

- What are the tasks to be accomplished in the next six months / one year

Budget

Partner Relationship Plan




Partner Name	Segment	Purpose	Necessary Outcome	Strategy

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Shelli Bischoff ● Karen Buck ● Leni Wilsmann ● Kristen Grigsby



1792 Wynkoop Street, Suite 307 • Denver, CO 80202
303.223.4886 • www.nonprofitimpact.com