



# *Standards for* excellence

AN ETHICS AND ACCOUNTABILITY CODE  
FOR THE NONPROFIT SECTOR

## **Strategic Partnerships**

Second edition, 2014



# Standards for Excellence® Quick Refresher

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- A tangible model for nonprofit organizations to carry out capacity building efforts
- A framework with a clear statement of the organization's commitment to best practices
- A self-regulatory tool to ensure public confidence and public support
- A demonstration of the organization's commitment to public service

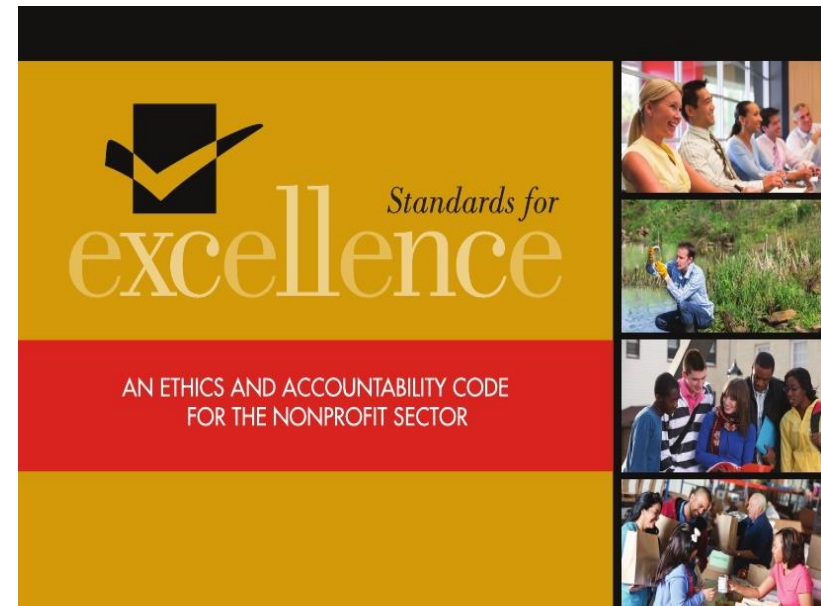
# The Standards For Excellence® Program – 4 Key Components



- The Standards for Excellence code
- Resources and Training
- Voluntary Accreditation & Recognition
- Educating the Public

# The Standards for Excellence® Code: An Ethics and Accountability Code For the Nonprofit Sector

- **6 Guiding Principles and 67 Standards**
  - Mission, Strategy, and Evaluation
  - Leadership: Board, Staff and Volunteers
  - Legal Compliance and Ethics
  - Finance and Operations
  - Resource Development
  - Public Awareness, Engagement and Advocacy







MISSION, STRATEGY AND EVALUATION

# Mission, Strategy, and Evaluation



- Mission and Impact
- Planning Strategically
- Organizational Evaluation
- Program Evaluation
- Strategic Partnerships

# Strategic Partnerships

- *Nonprofits engaging in strategic partnerships and formal alliances with other organizations should do so within the context of a board-approved policy outlining the goals and parameters of such partnerships. Depending on the type of strategic partnership, nonprofits should ensure that proper due diligence has been followed and that agreements, memoranda of understanding, or similar documentation have been thoughtfully reviewed and considered.*

# Why Partner?

- Programs & Services
- Broader Impact
- Improve Administrative Efficiency
- Leverage Funding
- Be Strategic





Respondents would like to use Strategic Partnerships in the following ways

Manage Costs

Leverage Funds

Mission Overlap

More Impact

Increase Awareness



# Respondents Report Barriers that Prevent Partnerships

Additional Burden of Partnering

# Equity of Funds vs. Effort

Internal Policies/Procedures

Competition for Funds

# Respondents Report Tips to Assist Partnerships

Working Together

**Structured, Formalized**

**Mission Driven**

Clear Goals, Roles, Duties,

**Mutually Beneficial**



# Collaboration Spectrum



COMPETE	CO-EXIST	COMMUNICATE	COOPERATE	COORDINATE	COLLABORATE	INTEGRATE
Competition for clients, resources, partners, public attention	No systematic connection between agencies	Inter-agency information sharing (i.e., networking)	As needed; often informal; interaction on discrete activities or projects	Organizations systematically adjust and align work with each other for greater outcomes	Longer term interaction based on shared mission & goals; shared decision-makers and resources	Fully integrated programs, planning & funding

← Turf

Trust →



# Types of Partnerships

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- David LaPiana "Models of Collaboration"
  - Fully Integrated Merger
  - Partially Integrated Merger
  - Joint Program Office
  - Joint Partnership with Affiliated Programming
  - Joint Partnership for Issue Advocacy
  - Joint Partnership with a New Organization Formed
  - Joint Administrative and Back Office Operations
  - Confederation

# Consider this..

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- Purpose: Why are we partnering?
- Autonomy: How is decision-making structured?
- Cross-industry or cross-sector partnerships: How will our styles of work differ and where can we compromise?

# Finding the Right Partner

- Alignment
- Benefit
- Continuity
- Delivery
- Risk
- Equity
- Financial



# Due Diligence



- Legal & ethical information (bylaws, conflict of interest policies, personnel policies)
- Organizational information (Board and staff lists, key funders)
- Financial information (990s, current financial statements, balance sheets)
- Specific policies/procedures
- Insurance & tax issues
- List of other partners

- Any lawsuits, audits, claims under  **WEXCELLENCE**



# Write it Down



- Memorandum of Understanding (MOUs)
  - The goals and missions of the partner organizations
  - Expected objectives or outcomes
  - Roles and responsibilities of each partner
  - Communication plans and protocol
  - Funding and resource agreements
  - Schedules/benchmarks
  - Performance management/evaluation plans
  - Contingency & Risk Sharing
  - Dissolution
  - Authorized Signatures

# Role of the Board



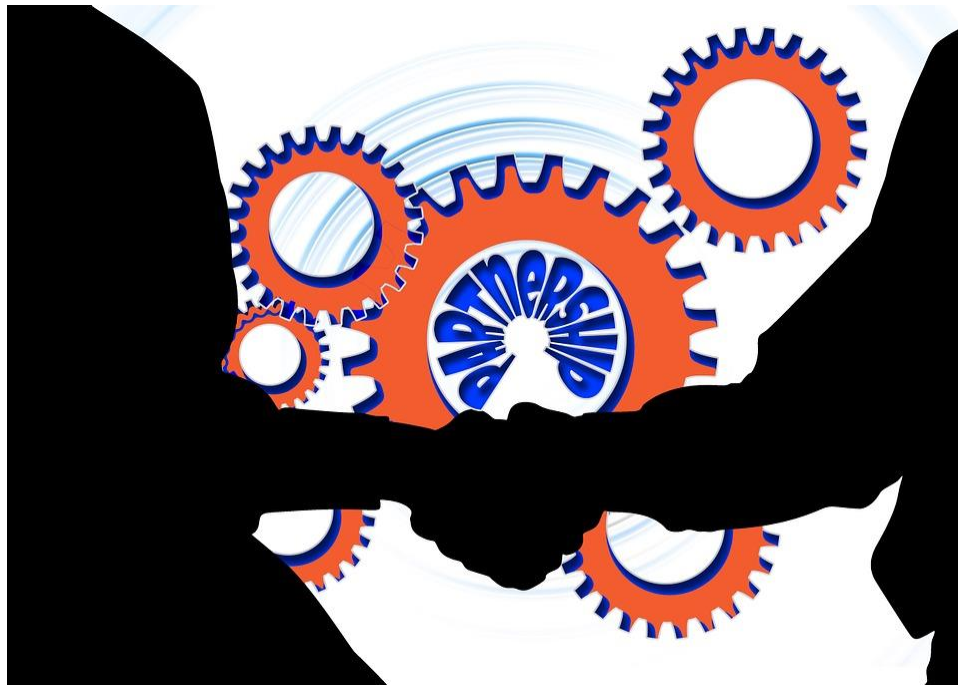
- Policy & Oversight
  - Check for mission alignment
  - Define the benefit to the organization
  - Place value on collaboration
  - Define success
  - Outline goals
  - Define procedures
- Identify & Vet

# Role of Management

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- Involve the Board
- Complete due diligence
- Be available
- Align resources
- Evaluation
- Share best practices

**QUESTION:** How might you approach your next potential partner differently?





# Resources



- Handout: Standards for Excellence Educational Resource Packet: Strategic Partnerships
  - Includes: Sample MOUs, due diligence checklist, strategic partnerships policy



The Standards for  
**excellence**

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