ROCHESTER AREA NONPROFIT CONSORTIUM

TAKING ACTION TO DEVELOP SHARED SERVICES PART II
HOSTS: BROOKE CARLSON, CONSORTIUM STRATEGIST
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
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- 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:

<table>
<thead>
<tr>
<th>Family Service Rochester</th>
<th>Ability Building Center</th>
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<tr>
<td>Zumbro Valley Health Center</td>
<td>Channel One</td>
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<td>Families First</td>
<td>IMAA</td>
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<td>Diversity Council</td>
<td>TBD</td>
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- Collectively identified initial priorities developed in November 2018: **Joint Purchasing**, **Health Insurance**, and **IT Tech Support**
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.
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
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*
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?

I ideas for potential trainers, contact Terri Allred.

Consider responding to extended call for trainings/panels/presentations from Greater Rochester area for MCN Conference.
Additional comments/questions, contact:

Terri Allred
MCN Southeastern Regional Coordination
Email: tallred@minnesotanonprofits.org
WHAT HAVE WE ACCOMPLISHED SINCE NOVEMBER?

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
Human resources administration-related functions
Recruiting and onboarding-related functions
Learning and development-related functions
Benefits-related functions
Government compliance-related functions;

High Priorities for Your Organization
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.
**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
Our plates are pretty full supporting...

- Web site maintenance
- I feel good with BCS. I am not...
- use of used equipment (desktops)
- managed services and equipment
- Office 365 Support
- Helpdesk
- Planning
- On-demand support
- Directors round-table
- Shared training
**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
**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
For more information, questions, please contact:

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