ROCHESTER AREA NONPROFIT CONSORTIUM

ALLIANCE FOR STRONG FAMILIES AND COMMUNITIES

HOSTS: BROOKE CARLSON, LENORE SCHELL (ALLIANCE), AND TED UCZEN (FEI WORKFORCE RESILIENCE)
Why are we here?
What have we accomplished since February?
How can you get involved?
What is the Alliance and what services and supports do they offer?
How is the Consortium working with the Alliance?
What are the next steps?
INTRODUCTIONS

At your table:

- Introduce yourself (name, organization, role)
- Share how you are involved in the work of the Consortium
WHY ARE WE HERE?

PURPOSE
WHY SHARED SERVICES?

Shared services are developed by 2 or more nonprofit organizations that collaborate to jointly access time and expertise of contractors, employees or fiscal sponsors to create positive impacts for their operations and their communities.

- Nonprofit Centers Network “Rethinking Overhead”
Shared services leverage economies of scale created when multiple organizations access services from same service providers. Additionally, shared services:

- **Strengthen a social purpose or community.**
- **Build the organizational capacity of service recipients.**
- **Foster trust and collaboration among service providers and service recipients.** This often leads to non-monetary exchange of resources or value.
- **Reduce the risks of participating organizations.**
WHY ARE WE HERE TODAY?

Learn about:

- Latest progress and plans to develop shared services;
- Opportunities to get involved in implementing our priority area action plans; and
- Alliance member benefits and shared service offerings for nonprofits such as human resources, finance, risk management, etc.
Ability Building Center
Channel One
Diversity Council
Families First

Family Service Rochester
IMAA
SE MN Area Agency on Aging*
Zumbro Valley Health Center
WHAT HAVE WE ACCOMPLISHED SINCE FEBRUARY?

OVERALL AND ACTION PLAN PROGRESS
OVERALL UPDATES

- Secured Additional Consortium Support:
  - Rochester Area Foundation (RAF) and Bremer funding
  - SeaChange Lodestar Fund
  - In kind support from RAF and others
- Formalizing Membership
- Successful Collaborative Trainings
- Discussions with Alliance about partnership
MEMBERSHIP AGREEMENT

- Contact information for organization and key procurement and operations staff.
- Access to relevant quantitative data regarding use of services and products to enable NC to compile accurate estimates for vendors.
- Grant permission for NC to negotiate with vendors on behalf of membership.
- Graduated annual dues schedule.
- Agree to support collaborative goals by committing to utilize your service and product purchasing power, in conjunction with NC membership, for a minimum period of time.
BENEFITS OF MEMBERSHIP

- Member-only discounts on wide array of services and products, including technology, human resources, insurance, office supplies and more.
- Opportunities to connect with your nonprofit peers regarding best practices, shared service agreements, budget management expertise, and other capacity building benefits.
- Ability to relieve some of operations and overhead burden, allowing more time to focus on core mission.
- Learn about new services or products, with option to be an early adopter or connect directly with those peers who are.
- Increase your visibility to community leaders, funders and vendors who have an interest in increasing nonprofits capacity.
Collaborated with Rochester Area Chamber of Commerce, MN Council of Nonprofits, and Rochester Area Foundation on trainings since March

Upcoming Trainings:
- July 17th – How to Lead, Manage, Motivate, and Supervise Employees Effectively
- September 19th – Organizational Efficiencies
- November 21st – Risk Management

Networking Events

Contact Terri Allred (tallred@minnesotanonprofits.org) for more information
ACTION PLAN
IMPLEMENTATION
UPDATES
**Health Insurance** - Increase support to local organizations in accessing affordable, high quality health insurance.

**Joint Purchasing of Office Supplies** - Increase opportunities to reduce expenses related to goods and supplies.

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

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

Progress

- Regularly updating working draft of “tip sheet”.

- Held first webinar; more will be planned.

- Several organizations will receive proposal from C&A Benefits. Projected savings 6 – 18%.

- In discussions with MCN, Alliance, OMC, and insurance brokers about longer term possibilities.

- Will also speak with Mayo contacts about opportunities.
JOINT PURCHASING: SUPPLIES

**Deliverable**
- Options to reduce costs of goods and supplies.

**Progress**
- Secured quotes comparing 3 local organization’s current spending with promising options.
- Found significant cost savings.
- Will prepare a grid to demonstrate cost savings.
**IT TECH SUPPORT**

**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 technical assistance, training, and networking opportunities (for organizations w/o IT expertise on staff).
- Networking opportunities (for organizations with IT expertise on staff).

**Progress**
- Began vendor discussions with to understand requirements for joint negotiation.
- Contract underway between ZVHC and Channel One.
- Monthly knowledge sharing meetings with IT experts. Next meeting is 12 pm 7/17 at Bear Creek Services.
- Discussions with County and others about opportunities for collaboration.
- Interest in bringing on student intern for support.
HUMAN RESOURCES

Deliverables

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

Progress

- Jeremy Emmi will help with this priority.
- Plan to develop:
  - Sample descriptions of shared staff options.
  - List of questions for potential vendors.
  - List of learning opportunities through local partners.
CREATING 21st CENTURY COMMUNITY SPACE

A response to Rochester constituents’ concerns for community space, increased connectivity, and more easily navigable resources.

AN INITIATIVE OF

Diversity Council

ROCHESTER AREA NONPROFIT CONSORTIUM
The community’s need for increased connectivity and more easily navigable resources were key findings in initiatives executed by Destination Medical Center, United Way of Olmsted County, Olmsted County Public Health, Community Networking Group, and the Diversity Council.

These findings were particularly pertinent for specific populations including veterans, teens, ethnic minorities, people with disabilities, and new residents.
**OUR SPACE**
- A central location outside the downtown core, easily accessible by current and future transit hubs and lines
- Welcoming experience for all
- Serves to bridge gaps and assist community connection to vital services
- Adequate, free, and accessible parking
- Technologically-integrated
- Flexible and easy to re-configure

**FOR THE ROCHESTER COMMUNITY**
- Community front door
- Common entry point to community resources and information
- Comprehensive referral services
- Nonprofit agencies and public agencies
- Cultural community center
- Shared gathering spaces for a variety of groups and functions
- Nonprofit co-op
- Co-location workplace for nonprofit organizations
- Commercial kitchen serving as a dedicated place for entrepreneurs as well as community meals
**A PLACE FOR ALL.**

**Common Entry Point - Community Front Door**

This cooperative reception model would direct a young family to educational opportunities, a veteran to service locations, an immigrant to a cultural affinity group, and a job seeker to employment resources. It would be open beyond traditional workday hours to accommodate the real-time needs of human beings.

**BENEFITS**

- A single resource that serves diverse purposes and people
- Close proximity of service providers reduces the amount of time individuals spend navigating systems and resources
- Increased sharing of resources, while reducing overhead by eliminating operational redundancies
- A space for cultural and community celebrations
- A place that draws and welcomes new residents while providing pathways for success in the local workforce and economy
- Expresses Rochester's commitment to inclusivity, accessibility, welcome/warmth, and to making Rochester a place where all can thrive
QUESTIONS?
HOW CAN YOU GET INVOLVED?

SUPPORTING THE CONSORTIUM
GET INVOLVED!

- Become a member
- Attend upcoming events specific to priority areas
- Try a suggested service and report back about your experience
- Volunteer your time/expertise/connections (e.g. logo, communications, etc.)
- Inform direction of Consortium
WHAT IS THE ALLIANCE AND WHAT SERVICES DO THEY OFFER?

LENORE SCHELL AND TED UCZEN
Operations Support Services

Strengthening Your Business Operations Capacity, So You Can Advance Your Mission

Presented to: Rochester Consortium Agencies

July 11, 2019
Vision: A Healthy and Equitable Society
Alliance Divisions
The Alliance for Strong Families and Communities is a strategic action network of thousands of committed social sector leaders driving to achieve our vision of a healthy and equitable society through the excellence, distinction, and influence of our network.

<table>
<thead>
<tr>
<th>Population Health and Well-Being</th>
<th>Education Success</th>
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<tr>
<td>Economic Opportunity</td>
<td>Safety and Permanency</td>
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A groundbreaking cross-sector partnership
National Imperative: The North Stars

- Commitment to Outcomes
- Capacity for Innovation
- Operating Model 2.0—A Strategic Partnership Approach
- Rigorous Financial Management Practices
- Regulatory Modernization
Operations Support Services

- Human Capital
- Financial Acumen
- Risk Mitigation
- Information Technology
- Fund Raising
- Marketing & Communications
Operations Support Services today

Human Capital

Financial Acumen

Risk Mitigation

Information Technology
Human Capital

Comprehensive Employee Benefits Solution
• Health, dental, and vision insurance
• Life insurance and disability
• Cobra
• Health savings accounts
• Flex spending accounts
• Retirement plan services
• Student loan optimization portal

Payroll Processing

HR Technology Platform
• Employee Performance Management
• PTO tracking
• Expense management
Human Capital

Secure Online Background Checks
Cost-Effective State Unemployment Tax Program
Translation Services
Workforce Resilience Solutions and Employee Assistance Program
FEI is a social enterprise owned by the Alliance for Strong Families and Communities, and has contributed over $42 million to the Alliance throughout its 40-year history.
Organizational Development

Customized tools to OVERCOME CHALLENGES

DIVERSITY AND INCLUSION
ANGER MANAGEMENT
TEAMWORK
LEADERSHIP DEVELOPMENT
CONFLICT MANAGEMENT
COMMUNICATION
TIME MANAGEMENT
BULLYING & HARASSMENT
INTERPERSONAL SKILLS
PROFESSIONAL DEVELOPMENT

Applying best practices to enhance company culture
Financial Acumen

**Accounting Services**
- Budget preparation
- Investment reconciliation
- Cash flow tracking
- Fiscal policies and procedures consulting
- Reconciliation of bank accounts
- Grant tracking
- Preparation of year-end 1099 forms
- Assist with preparation and completion of form 990

**Monthly and Yearly Financial Statements**

**Financial Reporting for Board Meetings**

**Management of Annual Audit**
Financial Acumen

Expense Analysis and Consulting
• Complimentary expense management analysis and strategic planning. No-out-of-pocket cost

Group Purchasing
• Access to pricing typically reserved for Fortune 100 companies
Risk Mitigation

Comprehensive Risk Insurance Services and Coverage

- Cyber Liability Insurance

Automated Security Awareness Program (ASAP)

Affordable Risk Management Tools, Templates, and Apps

All Alliance clients can create a free account with the Nonprofit Risk Management Center through our affiliate relationship with NRMC
Information Technology

Monitoring
• Operational monitoring
• Vulnerability scanning
• Penetration testing

Automated Security Awareness Program (ASAP)
• Consultation
• Baseline testing
• Interactive web-based training & testing
• Continuous assessment
Benefits of Partnering with the Alliance

• Proven results to strengthen the impact of nonprofits
• Access to intellectual capital of hundreds of influential industry leaders in our network
  • Best practices, policies, trends, industry knowledge
• Motivation to and investment in this business to help strengthen the capacity of CBOs
“In terms of importance, the financial piece is number one, but having the capacity to address human resource capabilities like providing insurance and other benefits is, I think, equally as important.”
- Judith Gethner, executive director of Illinois Partners

“I think we have a lot of grit on our team, but at the end of the day we don’t have to do everything. If there’s an entity that’s doing support services well, and it can do them for your organization, then let them. The resulting freedom allows you to focus instead on becoming an expert in the work you’re doing in your community.”
- Johanna Bergan, executive director Youth MOVE National
Contacts

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HOW IS THE CONSORTIUM WORKING WITH THE ALLIANCE?

PARTNERSHIP OPPORTUNITIES
WHAT ARE THE NEXT STEPS?

2019 IMPLEMENTATION
NEXT STEPS

- Ongoing Discussions with Alliance
- Sustainability Planning
- Continued Action Plan Implementation
- Trainings
- Communications and Evaluation Planning
- Next Consortium Forum: Fall 2019
CONTACT US!

For more information, questions, please contact:

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