

Two Sector Leaders Collaborate to Yield High-Impact Outcomes

Romana S. Lee-Akiyama, Robert Roach, and Ana Lisa Yoder 23 January 2013

Summary

The Philadelphia Foundation (TPF) and United Way of Greater Philadelphia and Southern New Jersey (UWGPSNJ) recently entered into a strategic partnership to create and implement the Nonprofit Board Leadership Institute (NBLI), providing intensive joint training for nonprofit board chairs and their executive directors. The collaborative nature of the Institute represents an effort to model what many grantmakers stress to the organizations they fund: that while collaborative work may require more staff time and resources than non-collaborative work, it can lead to a better end product. In the short term, collaboration on the NBLI resulted in pooling resources and utilizing existing infrastructure. More importantly, both organizations will benefit in the long term from the development of a relationship of trust that will likely materialize in further future collaboration.

The Research behind the Work

Nearly 18,000 nonprofit organizations populate the southeastern Pennsylvania footprint, a significant increase from the 15,000 that existed over five years ago. The growth of the sector continues to be an anomaly, considering that the current economy continues to struggle towards a recovery. Those who lead health and human services organizations and those who financially support these organizations as donors and funders can agree that "times are tough," as we are all tasked to do more, for more, with less. Client and community needs continue to grow, while resources either decline or stay status quo at best. When tackling large scale issues that surpass an individual organization's resources, it becomes necessary to assess one's capacity and look toward innovative strategies and creative solutions.

During the spring of 2012, The Philadelphia Foundation (TPF) and United Way of Greater Philadelphia and Southern New Jersey (UWGPNJ) collaborated to launch a new program that sought to strengthen and support the leadership of the nonprofit sector. The impetus for the Nonprofit Board Leadership Institute (NBLI) was research conducted by both organizations that affirmed the crucial role of a nonprofit organization's board of directors. In 2010, TPF released a white paper examining several aspects of nonprofit board leadership in the Southeastern Pennsylvania region. A key finding was that while some effective mechanisms exist to train and support nonprofit board members in the region, they are not sufficient to

fully meet the demand.

At the same time, UWGPSNJ's Nonprofit Excellence Council, an advisory body charged with advising United Way on its capacity-building strategy, had identified a need for nonprofit board leader training. This culminated in a 2012 United Way white paper, which found that despite increased attention nationwide to the leadership development needs of nonprofit board members, there was an absence of offerings targeting the critical role of the board chair, a position requiring both expertise and commitment to the organization. Research also highlighted the growing need for training up-and-coming board leaders. With baby boomers starting to retire, an increasing leadership void needs to be filled, but willing successors often lack the skills necessary for the position.

As both TPF and UWGPSNJ determined that they were in a position to help fill the training gaps identified by their respective research, they began exploring programmatic possibilities. Aware of each other's white papers and subsequent plans, the two organizations decided to work collaboratively on the NBLI rather than create separate programs. The decision was reinforced by the fact that TPF and UWGPSNJ were already funding many of the same organizations—because they had the same goal in mind for their programs, pooling their resources and partnering on one initiative was the smart and responsible idea to pursue.

The program developed, the NBLI, is an intensive training program offered annually to executive directors and their board chairs, equipping them with the knowledge, tools and support they need to effectively lead the organizations they serve. The four-session institute focuses on issues such as the typical life cycle of nonprofit organizations, ways to build the relationship between the executive director and the board chair, and nonprofit finances and fund-raising. The decision to invite executive directors and board chairs to jointly participate in the training was based on the governance and function of a nonprofit. While executive directors are responsible for strategically leading their organizations, they are governed by their boards; thus, the relationship between executive director and board chair is particularly important. The NBLI aims to encourage greater trust and more transparent communication between executive directors and board chairs.

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UWGPSNJ and TPF developed the NBLI and their working relationship through a framework of equality, symbolized by the side-by-side logos of both organizations on any document related to NBLI. Both organizations also made the same financial and staffing commitments to the project. Initial meetings focused on establishing clear

expectations around roles and responsibilities, and regular team meetings emphasized open communication and approval from both organizations for any decision made, large or small. It is important to note that, at least in the initial stages of the collaboration, this resulted in more staff time than would have been necessary had one organization taken on the project alone.

Nevertheless, one immediate and tangible benefit of collaborating on the NBLI was the access afforded by the existing infrastructures of each organization to implement aspects of the program. UWGPSNJ's information technology infrastructure was used for the NBLI program application process. Grant application and review were conducted through existing TPF infrastructure. All external communications were vetted by the communications departments of both organizations, and responsibility for media outreach was shared. Thus by effectively utilizing existing resources, TPF and UWGPSNJ were able to streamline these steps of the process.

Another immediate benefit of collaborating was the ability to pool resources to cover training costs and provide higher grant amounts. Many similar grant programs require organizations to find matching funds to fully cover project costs. Collaboration at the grantmaker level on NBLI meant that organizations could devote less of their time and energy to seeking funds and more time on the projects that will sustain their organizations in the long term.

Offering access to internal resources and tools, and making the extra effort to ensure that there was constant open communication, resulted in the development of a strong relationship of trust that has manifested itself in subsequent collaborations between TPF and UWGPSNJ, including the second annual NBLI, which will be held in spring 2013. Most important, the extra effort and time that both organizations devoted to the NBLI led to a strong product that was well received by its participants.

In a time when resources are scarce and the nonprofit sector is struggling to remain sustainable, strategic partnerships may well be the key to nonprofit survival. Both UWGPSNJ and TPF encourage nonprofit organizations to engage in strategic partnerships—collaborations between two or more organizations on projects that highlight a shared vision between the organizations involved. Not only does the partnership between The Philadelphia Foundation and United Way strengthen the message that collaboration can reap long-term benefits for all organizations involved, it also makes a public statement that collaboration at the grantmaker level can be a powerful tool for change in our community.

For more information on the NBLI, visit <http://unitedforimpact.org/ways-to-engage/leadership-opportunities/nonprofit-board-leadership-institute>.

Author bios

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Romana S. Lee-Akiyama, MSS, MLSP, is the director of capacity building at the United Way of Greater Philadelphia and Southern New Jersey. Ms. Lee-Akiyama brings a wealth of experience and knowledge of the nonprofit sector at both the national and local levels. She most recently served as the deputy director of the National Coalition for Asian Pacific American Community Development, an advocacy and capacity-building organization based in Washington, DC. Prior to this role, she also worked at the Philadelphia Chinatown Development Corporation as the director of development and programming. Ms. Lee-Akiyama has specialized in working with immigrant, refugee, Native Hawaiian and other vulnerable populations of color. She has served in a number of capacities throughout her more than 14 years of experience in the community development and nonprofit sector, including executive management, fundraising, program development and management, operations, administration and grants management. Ms. Lee-Akiyama holds a master's in social services and a master's in law and social policy from the Bryn Mawr College Graduate School of Social Work and Social Research, as well as a BA in international relations from Tufts University in Medford, Massachusetts.

Robert Roach comes to United Way with experience from a variety of nonprofit organizations. Over the summer, he

interned at Consumer Reports in Yonkers, NY, where he worked on various research projects. Mr. Roach's experience also includes evaluating the occupational health services provided by the Smithsonian Institution, analyzing a community-level HIV prevention program in Philadelphia and aiding the president of a community organization in San Diego in implementing an entrepreneurship class for economically disadvantaged high school students. Mr. Roach holds a B.S. in management science and a B.A. in sociology from the University of California, San Diego. Currently, he is pursuing a PhD in sociology at Temple University.

Ana Lisa Yoder, MSS, LSW is community impact manager for The Philadelphia Foundation. In this role, she partners with nonprofit organizations to implement the Foundation's grantmaking strategy, aimed at strengthening nonprofit performance through capacity building and general operating support. She also leads the Foundation's special capacity building initiatives. Ms. Yoder has nearly 20 years of experience in a variety of nonprofit settings including service on numerous boards and coalitions. Prior to joining the Foundation in 2009, she directed one of Philadelphia's leading programs serving victims of domestic violence, during which time she co-chaired the Philadelphia Mayor's Task Force on Domestic Violence. Ms. Yoder holds a Master of Social Service degree from Bryn Mawr College's Graduate School of Social Work and Social Research.