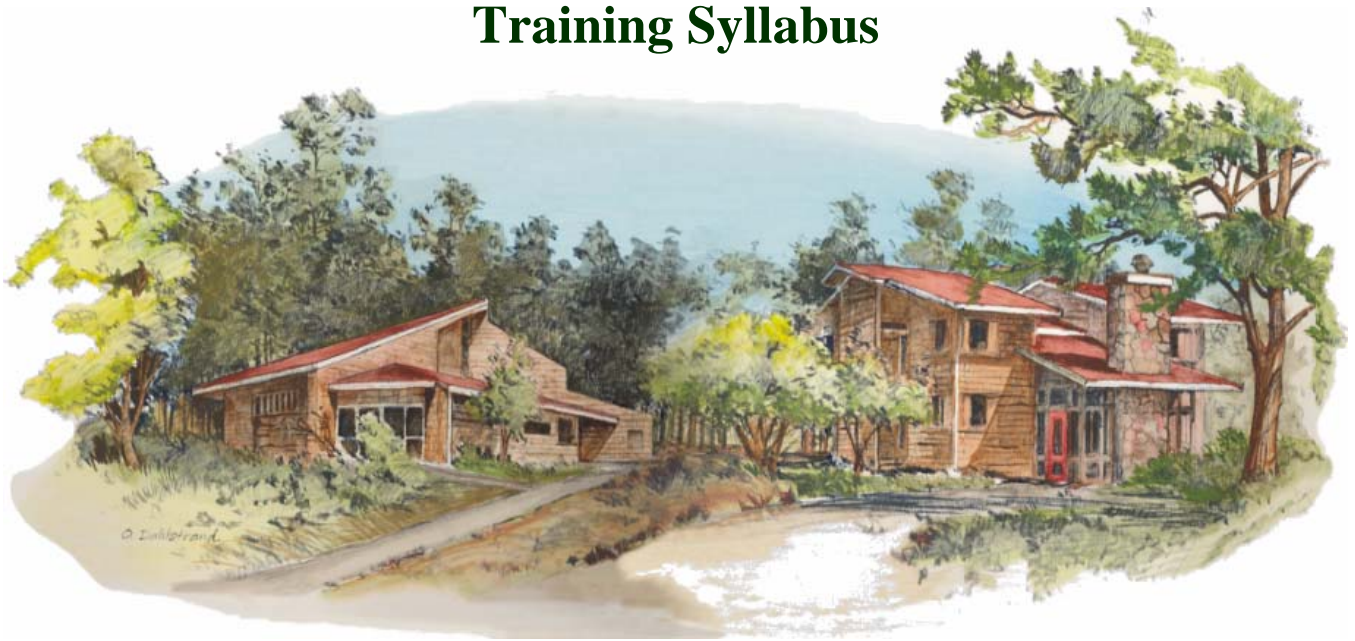


COOPERATING ASSOCIATION PARTNERSHIP WORKSHOP

March 27-30, 2008

Training Syllabus



William Penn Mott Jr. Training Center



Memorandum

Date: February 14, 2008

To: Supervisor

From: Department of Parks and Recreation
William Penn Mott Jr. Training Center

Subject: Cooperating Association Partnership Workshop Group 13

An employee from your office will soon be attending the formal training program described in the attached. Please insure that the employee is fully prepared to attend the session and that the groundwork is laid for the employee's implementation of the training upon returning to work.

You can assist with capturing the full value of the training by taking the following steps:

Prior to Training

1. Make sure that **specific** employee needs are identified and, if necessary, called immediately to the attention of the Training Coordinator.
2. Review with the employee the reason for the employee's attendance.
3. Review objectives and agenda with the employee.
4. Discuss objectives and performance expected after the training.

Immediately Following Attendance

1. Discuss what was learned and intended uses of the training.
2. Review the employee's assessment of the training program for its impact at the workplace and review the due date of the Post-Training Evaluation form.
3. Support the employee's use of the training at the work place.

Prior to Three Months Following Training

1. Employee after discussion with the supervisor login to the Employee Training Management System (ETMS) to complete the Post-Training Evaluation form.
2. Supervisor evaluates the effectiveness of the training on the employee's job performance and login to the ETMS to complete the Training Effectiveness Assessment form.

Thank you for your assistance in seeing that the full benefit of training is realized.



Tina L. Williams
Department Training Officer (Interim)

Attachment

cc: Participant

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***Mission Statement
Training Office***

The mission of the Training Office is to improve organizational and individual performance and productivity through consulting and collaboration, training and human resources development.

TRAINING CENTER STAFF

Tina L. Williams Department Training Officer (Interim)
Pat Bost Office Manager
Joanne Danielson Academy Coordinator
Chuck Combs Training Specialist
Sara Skinner Training Specialist
Dave Galanti Training Specialist
Michelle Gardner Cadet Training Officer
Connie Breakfield Cadet Training Officer
Pamela Yaeger Assistant Program Coordinator
Bill Spencer Assistant Program Coordinator
Edith Alhambra Assistant Program Coordinator
Summer Kincaid Assistant Program Coordinator
Eric Marks Program Assistant

THE MISSION

of the California Department of Parks and Recreation is to provide for the health, inspiration and education of the people of California by helping to preserve the state's extraordinary biological diversity, protecting its most valued natural and cultural resources, and creating opportunities for high quality outdoor recreation.



FORMAL TRAINING GUIDELINES

Welcome to formal training, an essential component in your career development.

Since 1969, our Department has been providing a continuously changing number of diverse training programs at its main training facility, the William Penn Mott Jr. Training Center, and other locations including Marconi Conference Center and, most recently, the Two Rivers Training Facility in Sacramento. The Department strives to enhance your learning and job performance with formal training of the highest quality.

Our Department's dedication to training is only one aspect of its commitment to you and to the public. This commitment is costly and represents an important investment in you and your career. You and the Department realize a return on that investment by your positive participation in formal training itself and post training follow-through.

The program you will be participating in is described in this training syllabus, which outlines what you can expect from this training and what is expected of you. This syllabus details what you should do before you leave for training; what to do when you arrive; what you will be doing while in training; and, importantly, what you should be able to do when you return to your work site. Specifically:

1. **SYLLABUS:** The syllabus is now accessible on the Employee Training Management System (ETMS). You should print a copy of the syllabus to bring with you to class. Your copy of this syllabus is an important part of your training experience and should be brought with you to training. Read it before you arrive and review it following the program along with material you received at training.
2. **PRE-TRAINING ASSIGNMENTS:** Your completion of pre-training assignments is essential to the success of your training. You are responsible for all reading assignments in preparation for classroom sessions. Time will be provided during working hours to accomplish any assignments which involve either individual or group efforts and resources. (Pre-training assignments are listed in the "Training Attendance Requirements" section.)

3. TRAVEL: Arrange your travel to and from the training through your District or Office. (No reimbursement for travel expense - including per diem costs - will be approved for travel not specifically authorized in advance by the District Superintendent.) Individuals may claim reimbursement for incidental expenses incurred as outlined in DAM 0410.6. The Training Center does not have the capability to provide transportation to/from Monterey Airport.
4. HOUSING: Housing will be assigned to you on a shared-room basis and will be available from 3:00 p.m. on the date of arrival to 12:00 noon on the date of departure. The Department provides your room and board expenses at the Training Center only. No per diem allowance will be authorized for living off-grounds. This does not preclude living off-grounds at your own expense. Please advise the Department Training Officer no later than one week before your scheduled arrival if you plan to live off-grounds. No animals are permitted in Asilomar housing. In the event of an emergency, staff must know your room assignment, therefore, you may not switch rooms without staff approval. Overnight guests are not allowed in the buildings unless registered beforehand at the front desk in Asilomar's Administration Building. Quiet hour for lodge living areas is 10:00 p.m.

HOUSING CANCELLATION POLICY: If you do not need lodging or must change or cancel your reservation, you must contact the Training Center at least 72 hours prior to your date of arrival. The Training Center is committed to ensuring that the reservation that has been made for you is accurate and needed.

5. MEALS: Meals will be provided, semi-cafeteria style, from dinner on the date of arrival through lunch on the date of departure. Meals will be served at 7:15 a.m. for breakfast, 12:00 noon for lunch, and 6:00 p.m. for dinner. Hot or box lunches may be provided on some days. If you require a special diet, notify the Asilomar Chef at 831-372-8016 no later than one week before your scheduled arrival.

In order to assist participants with limited mobility, Asilomar provides a shuttle to and from the dining hall. Please contact either Asilomar staff upon check in, or Training Center staff upon your arrival, for instructions on arranging a transport.

6. OFF-GROUNDS ACCOMMODATIONS: When authorized to stay off-grounds by the Department Training Officer, the Training Center will pickup the cost of your room and meals at the current DPR Asilomar rate. If you stay off grounds and have meals on grounds, the Training Center will authorize only what the Department pays Asilomar for lodging.

7. CLOTHING: Field uniforms as found in "Description of Required Field Uniforms", DOM Chapter 2300, Uniform Handbooks, not including optional items, will be worn daily by all uniformed employees during formal training sessions **unless otherwise specified in the Program Attendance Checklist**. Non-uniformed employees shall wear professional business attire.

Because we are on the conference grounds with many other groups, and the image we project as State Park employees is important not only during working hours but off duty hours as well, your informal sportswear should be appropriate.

8. ROOM SAFES: Two safes have been installed in each of the lodge rooms used by the Training Center (Live Oak, Tree Tops, and Deer Lodge). These safes are a type that allows the user to input their own combination of numbers to facilitate opening and closing. The Training Center has a master key for emergency entry. Safes are to be left in the open position when checking out of your room.
9. WEAPONS: Weapons are permitted in rooms under the following conditions. Authorized firearms and magazines stored while at the Training Center shall be in a safe condition and stored in one of the following locations: your room safe in Live Oak, Tree Tops, or Deer Lodge, one of the Training Center's safes in the Whitehead Room or secured in your vehicle.
10. ALCOHOLIC BEVERAGES: Participants shall not possess or consume alcoholic beverages in common areas (living room) while on the Asilomar Conference Grounds unless provided and hosted by Concessionaire Delaware North.
11. SMOKING: Smoking is not permitted in the Training Center or in any lodge or guest room on the Asilomar Conference Grounds.
12. TRAINING CENTER: The Training Center is located on Asilomar Conference Grounds, part of Asilomar State Beach. The Conference Grounds are operated for our Department by a concessionaire, and all lodging and food services are provided to us by employees of the concessionaire. Constant efforts are made to maintain a sound, harmonious working relationship between the Department and concessionaire. None of us can expect preferential treatment for any reason and, as a departmental employee, you will be expected to join in our continuing effort toward an effective relationship with each Asilomar concession staff member. On occasion, non-departmental groups may be staying in the same lodges. It is imperative that you represent the Department well on and off duty.
13. REGISTRATION: When you arrive at Asilomar Conference Grounds, go directly to the front desk at the Asilomar Administration Building for your room key and dining room ticket. If you require vegetarian meals, notify the front desk representative and your meal ticket will be marked accordingly.

14. **COURSE LEADERS:** The formal training you will attend is developed and, for the most part, conducted by experienced State Park employees in field and staff positions. Some courses will be conducted by qualified instructors from other agencies and educational institutions. Your course leaders have proven their ability and knowledge in their profession, and provide a level of expertise difficult to match.
15. **TRAINING CENTER STAFF:** A Training Center staff member has been assigned responsibility for your training group as well as for your training program. That staff member usually serves as a Course Leader as well as a Coordinator. During the program, you may be asked to assist Training Center staff in the logistics of your training program (organizing field trip transportation, supervising classroom breaks, etc.). Center staff will do all within their power to make your training experience pleasant and meaningful.
16. **TRAINING MATERIALS:** May be made available to you at both your unit and the Training Center. Handout materials issued at your unit should be brought to training for possible use. A conference binder or notebook will be issued to you at the training session for note taking and convenience in handling materials. Copies of DAM and DOM will be available to you for self-study. Bring your own pens and pencils.
17. **ATTENDANCE:** Regular attendance is a critical course requirement and your participation is important to the success of this training. All absences, except those of an emergency nature, must be approved in advance by the Training Specialist.
18. **COLLEGE CREDIT:** Most training programs are accredited by Monterey Peninsula College for lower division credit. If you successfully complete an accredited program, you will receive either a letter grade or a credit/no-credit designation.
19. **MPC STUDENT ID:** If you have filled out an MPC application before, you have already been issued a student ID number to use in lieu of your SSN on future applications. You can obtain your MPC ID number by going to their secure website and providing your SSN number (no name required) and birthdate.

<https://autobahn.mpc.edu/scripts/autobahn.exe/Execute?Application=WebReq&Program=REPORT-SR-FIND-SSN>

Newcomers to training will still need to provide their SSN on the first MPC application only, after which a student ID number will be assigned and available at the web address above within a few weeks of the program's conclusion. You can store your MPC ID numbers in your ETMS Profile for future reference.

20. VEHICLES: All vehicles should be parked in the lots adjacent to the Training Center. Any questions regarding use of a State vehicle while at the Training Center should be discussed with your supervisor prior to your departure for training, or with your Program Coordinator while at the Training Center.
21. BICYCLES: If you bring your bicycle, store it in the bicycle shed next to the Training Center. Bicycles may not be brought into any building nor chained to lamp posts, trees, etc. The Training Center has a limited number of bicycles available for your use. Prior to your use, you are required to complete a safety inspection and sign a waiver which is posted in the bicycle shed.
22. MAIL: Mail forwarded to you during your time at the Center should be addressed to you in care of:

Department of Parks and Recreation
WILLIAM PENN MOTT JR. TRAINING CENTER
P. O. Box 699, Pacific Grove, CA 93950
23. CELL PHONES: As a courtesy to your fellow participants and course leaders ensure that your cell phone is turned off during classes. Participants should not be receiving or making cell phone calls during class time. Please limit those calls to your breaks.
24. FAX: The Training Center's FAX number is (831) 649-2824.
25. TELEPHONE: Limit phone calls during classroom hours to urgent business or emergencies. Anyone wishing to contact you by telephone during working hours should call the Center at (831) 649-2954. Calls after 5:00 p.m. or during weekends should be made to (831) 372-8016, Asilomar Conference Grounds, and the caller should tell the switchboard operator you are with a Department of Parks and Recreations training group. **Please Note: There are no longer pay telephones outside of the Training Center. There are pay telephones located at the Asilomar Administration Building.**
26. LAUNDRY AND DRY CLEANING: May be taken care of by you at one of several local establishments. An iron is available for 24-hour checkout from the Training Center front desk.
27. RECREATION: Facilities available on grounds include a heated swimming pool, ping-pong and pool tables, and a volleyball court. The Monterey area offers horseback riding, golf, tennis, racquetball, deep sea fishing, and many historical landmarks and scenic sights to explore.
28. POST-TRAINING ASSIGNMENTS: In connection with formal training are to be completed under the direction of your supervisor. See "Program Attendance Requirements" in this syllabus.

29. COFFEE BREAK REFRESHMENTS: Will be available throughout each session at the Center. You will be asked to contribute to the "Hospitality Fund" to defray expenses. Please bring your own coffee cup.

PROGRAM ATTENDANCE CHECKLIST

To assist you in your preparation for formal training session at the William Penn Mott Jr. Training Center, the following list is provided:

_____1. Read and understand the program syllabus prior to your arrival at the Training Center.

_____2. Complete the following pre-training assignments:

Read and be aware of main points in 21 Partnership Success Factors by Brian O'Neill

Complete and return Accomplishments and Challenges by **March 13, 2008**. The assignment may be returned via mail, fax or email to:

John D. Mott, Cooperating Associations Program Manager
Interpretation and Education Division
California State Parks
1416 9th Street, Room 1449-1
Sacramento, CA 95814
TEL (916) 654-5397
FAX (916) 654-9048
Email: jmott@parks.ca.gov

Read and be familiar with "Best Practices on One Page" by Marianne Philbin.

Please bring any mission/vision statements and/or strategic plans you may have with your association for class discussion.

_____3. Arrange your travel through your Unit/Office.

_____4. Professional business attire (uniforms are not required for this program).

PRE-TRAINING ASSIGNMENTS

Pre-Training Assignments:

By March 13, 2008:

1. Complete and return Challenges and Successes **by March 13, 2008** to John Mott

Before class begins on March 28, 2008:

2. Read and be familiar with the syllabus and class objectives.
3. Read and be familiar with the main points in 21 Partnership Success Factors by Brian O'Neil.
4. Read and be familiar with "Best Practices on One Page" by Marianne Philbin.
5. Bring a copy of your association newsletter and annual or strategic plan to share.

CAPW Success Stories and Challenges

Pre-training Assignment

Due March 13, 2008

Cooperating Association Name:

Success Stories:

Success Stories normally consist of the association and the park working together to create quality facilities, programs, and/or publications. Describe how the association and the park have worked together and some of the results of this effort:

Opportunities/Challenges:

Any relationship has opportunities and challenges. What opportunities or challenges are facing the association/park relationship during the next 12 months?

Assistance:

Successful people get help. Is training or other assistance needed for the association/park to meet the opportunities and challenges indicated above? _____ If so, what?

By March 13, 2008 return to :

John D. Mott, CA State Parks, Interpretation and Education Division PO Box 942896, Sacramento, CA 94296-0001
FAX (916) 654-9048 Email: jmott@parks.ca.gov

Name : _____

PARTNERSHIP SUCCESS FACTORS

Brian O'Neill, National Park Service Superintendent

Mr. Brian O'Neill and his staff at the Golden Gate National Recreation Area (GGNRA) have made partnerships a way of thinking about how best to accomplish the park's mission and build a community of stewardship. Recently, they determined that 18.5% of the park services were being delivered by NPS staff and the other 81.5% by a host of park partners. These figures underscore the breadth and value of partnerships at GGNRA.

Brian and his staff are always "honing their partnership edge" by being on the lookout for and gathering innovative partnership ideas and best practices from other practitioners around the nation and in other countries. The following 21 partnership success factors reflect two decades of the Golden Gate National Parks serving as a learning laboratory. These factors are a synthesis of "best practices" from many sources.

1. **FOCUS ON IMPORTANT NEEDS** – Partnerships take time to establish and nurture in order to have successful outcomes. The decision to establish a partnership should begin with the belief that an important need can best be fulfilled through a partnership. Potential partners will always be knocking at your door suggesting partnering arrangements. Often we find ourselves in reactive rather than proactive situations -- responding to an idea from an outside party. It is more productive to be proactive. First determine that a partnership is the best way to accomplish an important body of work. Then seek out the partner or partners who might best be able to help. In some cases you may need to create the right partner.
2. **MAKE THE PARTNERSHIPS A WIN-WIN** – Successful partnerships begin and thrive with a clear understanding that mutual benefits will accrue to the partners involved. Each partner may not benefit equally, but each must realize a value-added benefit. Each partner must constantly assess the needs of their respective partners and ensure that individual and collective actions are responsive to those needs. It is important to tie the partnership and its outcomes to the missions of each partner. Partnership initiatives should not only be a great thing to do but also a benefit to each partner. Sharing resources, benefits and recognition for successes keeps the partnership from becoming lopsided, or dominated by any one player. Each partner needs to see their contribution alongside the benefit gained.
3. **ADOPT A SHARED VISION** – Development and continuing refinement of a shared vision of the work to be accomplished is key to the success of any partnership. The shared vision should evolve from the full engagement of all partners in the relationship. The vision should reflect both the broad body of work and each project or initiative to be undertaken.

Too often, one entity in a partnership independently develops the vision without full engagement of the other partner(s). This violates the underlying premise of a

partnership and often results in insufficient ownership or emotional buy-in. Successful partnerships demonstrate a culture of full engagement from the very beginning that leads to collective enthusiasm and achieving results.

4. **NEGOTIATE A FORMAL AGREEMENT** – Good intentions and a handshake are not enough. Partnerships need formal written agreements and work plans that define mutual interests and expectations, the roles and responsibilities of each partner, and clear accountability for the work to be performed. The formal agreement serves as a mutually binding contract to ensure that each partner acknowledges and fulfills their responsibility. Most people are overextended with work, and tasks can fall through the cracks. If a given partnership is important, provide structure for the partnership through a formal agreement and specific work plans that lay out what tasks need to be performed for each initiative, by whom, and when. In a busy world, clearly written intent, roles, process, schedules, and accountability procedures guide performance and follow through. If differences arise or performance lags, the formal written agreement provides a touchstone for accountability, revisiting intent and commitments, reconciliation, and getting back on track. When needed, the agreement should be updated or amended to keep it current.

5. **ENSURE GOOD COMMUNICATION** – The success of every partnership is dependant upon the structure, frequency, and quality of communication between the partners. The most successful partnerships incorporate regularly scheduled meetings or conference calls to review how the relationship is working and progress on individual initiatives or work elements. The work schedule/calendar should reflect the importance of the work. Even the best partnerships do not carry their own momentum for long without a structure for touching base to stay on task and on schedule. The chief executive of each partner entity in a relationship must demonstrate leadership and stay involved to the extent that executive level interest is re-enforced and policy direction is provided on a sustained basis. The executives also are responsible for ensuring that good communication processes are in place within and between each partner entity to maintain the excitement of the collaboration, resolve issues, and advance the work. No partnership can reach its full potential without good communication practices as a core element of the relationship. Partnerships, like any human relationship, are about communication, communication, and communication.

6. **ENSURE THE PARTNERSHIP IS OWNED BY YOUR WHOLE ORGANIZATION** – To succeed, partnerships need to be truly understood and embraced by the entire staff of the partner organizations. Partnerships often originate as a dream or vision of the CEO or an individual(s) within an organization and the compelling reasons and excitement for the potential outcomes are not shared throughout the organization. This incomplete organizational buy-in inevitably limits or undermines full success when the rationales and commitments are not understood and shared by staff who have responsibilities for implementing the partnership. It is crucial for the leader to invest time and energy to build ownership of the partnership throughout

supervisory and staff levels. If the partnership is not understood or accepted as being important, it is difficult to sustain over time, especially when the key individuals responsible for its creation take other jobs or retire. Build a sense of team and a partnership culture so everyone understands the importance and value added by working collaboratively. You need to instill the importance of continually acknowledging the contributions of each party to the overall effort. In essence, individualism needs to be transformed into shared stewardship and responsibility that is re-enforced by actions as well as words.

7. **MAINTAIN AN ENVIRONMENT OF TRUST** – Trust is an essential ingredient for successful partnerships and enables collaboration and contribution. Trust must be demonstrated and earned day by day. A single betrayal can be costly and make it hard to regain the same level of trust between the partners. Trust eroding behaviors include: independent action by one partner that has not been shared with the other partner(s); grandstanding at the expense of another partner; not honoring one's word, commitment or confidentiality; creating suspicion in terms of one's motives; or acting in any way contrary to the best interests of the overall partnership. You build trust through the consistency and integrity of your actions over time. And you have to trust your partners in order to be trusted.

8. **LEAVE YOUR EGO AND CONTROL AT THE DOOR** – The most insidious impediment to good partnerships is the unwillingness or inability of a partner to share power and control. This can be the "Achilles heel" of partnerships. At their very basic definition, partnerships are about shared power, shared vision, and shared responsibility. While one entity may possess a superior position, larger budget, more staff, etc. in a relationship, the execution of the work and credit for accomplishments should not reflect this. This is not about a landlord-tenant relationship. This is about two or more entities working in unity to accomplish important work. A "boss - servant" mentality will lead only to frustration and unfulfilled promise. Partnerships are about "we" not "I." They are about creating an equality of importance - an environment where individual personal egos are subservient to the interests of the whole.

This being said, it is important to help your organization understand that partnering does not mean giving up control or influence, nor does it mean that organizations give up their autonomy. Good partnerships represent a delicate balance between maintaining one's own identity and adding value to a collective effort.

9. **UNDERSTAND EACH PARTNER'S MISSION AND ORGANIZATIONAL CULTURE**
Every organization has its own culture that is built over time, based on its mission, its practices, its people, its governing values, its traditions, and its institutional history. In any partnership situation, it is important to acknowledge and understand these different organizational cultures, to respect them, and to find ways that these realities can contribute to strengthen the mutual endeavor. The most successful partnerships recognize and value their differences and find ways to integrate them into a workable overarching partnership culture.

10. UTILIZE STRENGTHS OF EACH PARTNER – Each entity in a partnership brings special capabilities, unique authorities, and different flexibilities to further the work of the partnership. As specific needs and tasks are addressed, consider the particular strengths of each partner in determining the most cost-effective approach and who best to accomplish a specific task. Successful partnerships are characterized by a flexible approach to how needs and responsibilities are matched given each partner’s funding, policies, political connections, and other considerations.

11. FIND WAYS THROUGH THE RED TAPE – Partnerships regularly face “red tape” barriers in trying to work across organization lines, especially with public sector partners, which tend to have more regulations. Getting through these barriers and complications takes creativity and persistence. This can lead to heightened frustrations and complications in moving desired work forward in a timely manner. The more entities in a relationship, the more likely that legal, policy, attitudinal, and cultural challenges will be part of doing business. Successful partnerships acknowledge and address these realities up front and take satisfaction in resolving them. Convert your stumbling blocks to stepping stones. Successful partnerships map out the red tape barriers and mobilize whatever it takes to overcome them. It is too easy to point fingers or use these impediments as excuses for derailments and not achieving success. How partners overcome adversity and the institutional complexities of individual partner members will determine, in large measure, the success of the partnership.

12. BUILD STEP BY STEP – It is natural for the partners to want early successes. There is a tendency to look at similar partnership arrangements and their results without appreciating all the steps taken that led to the result. You have to invest to get results and process is important to achieve successful outcomes. Every situation presents a different set of opportunities based on the unique social, economic and political realities in which a partnership must operate. Much can and should be learned from the experience of others. Good partnerships take a steady investment of time and energy to build and develop. Successful partnerships are built incrementally by starting at the beginning, and growing gradually and tackling more complex initiatives based on the competencies gained from the previous efforts.

Successful partners understand the value of due process and earned vs. instant gratification. They recognize that investment in building the infrastructure necessary to achieve future success is important and are willing to forgo premature success in order to achieve larger, more important long-term gains. “Go Slow to Go Fast.” Partners will grow as far in the partnership as the other partner(s) are willing to help or let them. Challenge yourself and your partners to collectively raise the bar of expectations and advance the partnership step-by-step.

13. STRIVE FOR EXCELLENCE – A partnership ultimately gains stature and a reputation based on the quality of the work it accomplishes. The most successful partnerships understand the importance of doing everything well. Build an early

reputation for excellence and sustain that reputation. This will be an important factor in how others view your partnership and what doors will be opened to you. People, and potential funders, want to associate with important work and a reputation for excellence. Step back and analyze what you want people to say about your partnership's work and organizations. This standard then should underscore your strategy, behaviors, and actions to ensure your desired reputation is achieved.

14. DIVERSIFY YOUR FUNDING SOURCES – The ultimate success of any partnership depends on the human and financial resources it is able to garner. Successful partnerships develop multiple and steady sources of support, particularly for covering basic operational costs and launching new initiatives. There are many examples where partnerships become too dependent on one or too few sources of financial support. When these sources are reduced or disappear, sustainability of the partnership is jeopardized. Building a more diverse funding base is the best hedge against the vagaries of over reliance on fund sources that may be problematic or undependable from year to year. Develop and periodically update a comprehensive business plan that addresses both near and longer term public and private funding sources, and earned as well as contributed funds that will give your partnership staying power and adaptability.

15. CONSTANTLY SEEK OUT AND ADOPT BEST PRACTICES – The best practitioners are those who are a sponge for new ideas and always on the lookout for innovation and creativity that can be adapted to their partnership. Too often, we hear statements such as “We don’t do things that way. We’ve always done it this way.” “It won’t work.” “This is too risky.” “You have to tell them what they need to know.” “Don’t let them set the agenda.” While such cautionary thoughts need to be considered, successful partnerships are open to new ideas and better ways to accomplish their goals. They can readily grasp and adapt best practices. Overcoming resistance to change is one of the major challenges to partnership success.

Partner entities need to seek ways to build in greater flexibility and adaptability in their structure and work in order to take advantage of “partnering moments.” Establish a work environment in which reasoned risk taking and creativity are encouraged and rewarded and people are willing to risk possible failures in order to succeed. Leaders should act as “champions” with the courage to support experimentation and risk taking and run interference when necessary.

Resourcefulness also characterizes successful partnerships. Work together to identify and engage the abundant human talent residing in most communities to participate in and assist your partnership.

16. ALWAYS BE COURTEOUS AND DIPLOMATIC – Sustaining successful partnerships involves hard work, practiced effectively and consistently over time. It is essential that strong ground rules be established by the partner entities that will govern how the organizations and individuals will interact and treat each other.

There is no room for disrespectful behavior. It serves only to tarnish how partners interact and work together. Honesty, respect, courtesy, tact, and diplomacy, should govern partner relationships.

A useful partnering technique is for the partners to define all behaviors that are crucial to sustaining good relationships and then ensure that accountability measures are in place to re-enforce their ongoing practice. Successful partnerships work constantly on developing effective relationships built on trust and a shared commitment to each other's interests and success.

17. **HONOR YOUR COMMITMENTS** – Partnership work entails perseverance and follow through by each participating organization and individual. Partnerships require a shared commitment to each other's success. Sustaining any partnership requires that exciting ideas of interest to the participants actually get executed. Progress depends on each person in the partnership honoring their commitment and following up their words with deeds. When work does not get accomplished, it suggests that the work was not really that important to the individual or organization. This, in turn, builds frustration in the other participants and eats at the mutual trust factor so essential to effective partnering. Successful partnerships address these realities by putting in place reliable accountability measures and regular executive base-touching processes to stay on top of commitments and actions.
18. **CELEBRATE SUCCESS** – It is a mistake to not take time to formally and frequently celebrate successes. Successful partnerships look for every opportunity to celebrate individual project successes or key benchmarks in the evolution of the partnership. Such celebrations allow the partners to recognize good work being done that re-enforces the goals of the partnership; to gain some outside recognition of the partnership; and/or to demonstrate possibilities for the partnership to grow. People often are reluctant to take the time to celebrate but invariably are pleased when it does occur. Recognizing and celebrating accomplishments helps motivate and spur people on to new challenges. It is a lost opportunity when it does not occur. If one's goal is to build greater community awareness of the partnership, then the partners need to take every opportunity to legitimately "toot their horns" and market their work and successes. Besides many people who pitch in on partnership do so because they believe in the cause and because it is enjoyable. Celebrating success milestones ensures everybody's "fun-quotient" stays high. Especially when results are going to take time, it is important to have some early successes and milestones to enjoy and celebrate to build a sense of accomplishment and momentum.
19. **RESPECT THE RIGHT TO DISAGREE; ACT ON A CONSENSUS BASIS** – There are times and circumstances in partnerships where honest differences will surface and where reluctance to take action on a proposal is deeply held and where compelling reasons are presented on why an action cannot be supported. It is important that partners respect these positions with adequate dialogue and understand the basis of the concerns. In successful partnerships, ground rules are

established to give each partner a veto power over proposed actions. Partnership work means reaching consensus among the partners. Homework well done should eliminate most of these differences before they become contentious. There simply is too much good work where commonality of support can be achieved for these situations to erode the core working relationship.

20. NETWORK AND BUILD RELATIONSHIPS – A core competency in partnership work is the ability to network and build relationships. People sell ideas to others. People lend support because people ask them to. Partnerships are by definition about people working together and reaching out to others to gain their emotional engagement. Successful partnerships establish formal systems to identify people who can add value and support. They strategically build new relationships and expand networks to accomplish their priorities. Their relationship building work is deliberate and proactive rather than reactive or coincidental. It is based on a clear strategy of engaging the specific organizations and individuals within the broader community who can advance the work of the partnership. Systematically match your needs with potential sources of support and resources to ensure that effective connections occur.

21. PUT MECHANISMS IN PLACE TO RE-ENFORCE THE PARTNERSHIP – To realize its full potential, a partnership needs: a clear vision, dedicated and skilled people, a rewards and recognition program, incentives that stimulate desired partnership activity, sustained management support and involvement, operational funds, and a clear understanding among supervisors and staff of the potential benefits that result from the partnership arrangements. These are complex, but essential, elements to put in place. The seriousness with which they are addressed will determine your degree of success.

It all boils down to how deliberate and strategic you and your partners are in building a “partnership culture” that incorporates these success factors and the commitments you are willing to make. Understand and adapt success behaviors, develop competencies for these behaviors to be regularly practiced, and align your partnership to succeed.

22. FOCUS ON IMPORTANT NEEDS – Partnerships take time to establish and nurture in order to have successful outcomes. The decision to establish a partnership should begin with the belief that an important need can best be fulfilled through a partnership. Potential partners will always be knocking at your door suggesting partnering arrangements. Often we find ourselves in reactive rather than proactive situations -- responding to an idea from an outside party. It is more productive to be proactive. First determine that a partnership is the best way to accomplish an important body of work. Then seek out the partner or partners who might best be able to help. In some cases you may need to create the right partner.

23. MAKE THE PARTNERSHIPS A WIN-WIN – Successful partnerships begin and thrive with a clear understanding that mutual benefits will accrue to the partners

involved. Each partner may not benefit equally, but each must realize a value-added benefit. Each partner must constantly assess the needs of their respective partners and ensure that individual and collective actions are responsive to those needs. It is important to tie the partnership and its outcomes to the missions of each partner. Partnership initiatives should not only be a great thing to do but also a benefit to each partner. Sharing resources, benefits and recognition for successes keeps the partnership from becoming lopsided, or dominated by any one player. Each partner needs to see their contribution alongside the benefit gained.

24. **ADOPT A SHARED VISION** – Development and continuing refinement of a shared vision of the work to be accomplished is key to the success of any partnership. The shared vision should evolve from the full engagement of all partners in the relationship. The vision should reflect both the broad body of work and each project or initiative to be undertaken.

Too often, one entity in a partnership independently develops the vision without full engagement of the other partner(s). This violates the underlying premise of a partnership and often results in insufficient ownership or emotional buy-in. Successful partnerships demonstrate a culture of full engagement from the very beginning that leads to collective enthusiasm and achieving results.

25. **NEGOTIATE A FORMAL AGREEMENT** – Good intentions and a handshake are not enough. Partnerships need formal written agreements and work plans that define mutual interests and expectations, the roles and responsibilities of each partner, and clear accountability for the work to be performed. The formal agreement serves as a mutually binding contract to ensure that each partner acknowledges and fulfills their responsibility. Most people are overextended with work, and tasks can fall through the cracks. If a given partnership is important, provide structure for the partnership through a formal agreement and specific work plans that lay out what tasks need to be performed for each initiative, by whom, and when. In a busy world, clearly written intent, roles, process, schedules, and accountability procedures guide performance and follow through. If differences arise or performance lags, the formal written agreement provides a touchstone for accountability, revisiting intent and commitments, reconciliation, and getting back on track. When needed, the agreement should be updated or amended to keep it current.

26. **ENSURE GOOD COMMUNICATION** – The success of every partnership is dependant upon the structure, frequency, and quality of communication between the partners. The most successful partnerships incorporate regularly scheduled meetings or conference calls to review how the relationship is working and progress on individual initiatives or work elements. The work schedule/calendar should reflect the importance of the work. Even the best partnerships do not carry their own momentum for long without a structure for touching base to stay on task and on schedule. The chief executive of each partner entity in a relationship must demonstrate leadership and stay involved to the extent that executive level interest

is re-enforced and policy direction is provided on a sustained basis. The executives also are responsible for ensuring that good communication processes are in place within and between each partner entity to maintain the excitement of the collaboration, resolve issues, and advance the work. No partnership can reach its full potential without good communication practices as a core element of the relationship. Partnerships, like any human relationship, are about communication, communication, and communication.

27. ENSURE THE PARTNERSHIP IS OWNED BY YOUR WHOLE ORGANIZATION –

To succeed, partnerships need to be truly understood and embraced by the entire staff of the partner organizations. Partnerships often originate as a dream or vision of the CEO or an individual(s) within an organization and the compelling reasons and excitement for the potential outcomes are not shared throughout the organization. This incomplete organizational buy-in inevitably limits or undermines full success when the rationales and commitments are not understood and shared by staff who have responsibilities for implementing the partnership. It is crucial for the leader to invest time and energy to build ownership of the partnership throughout supervisory and staff levels. If the partnership is not understood or accepted as being important, it is difficult to sustain over time, especially when the key individuals responsible for its creation take other jobs or retire. Build a sense of team and a partnership culture so everyone understands the importance and value added by working collaboratively. You need to instill the importance of continually acknowledging the contributions of each party to the overall effort. In essence, individualism needs to be transformed into shared stewardship and responsibility that is re-enforced by actions as well as words.

28. MAINTAIN AN ENVIRONMENT OF TRUST – Trust is an essential ingredient for successful partnerships and enables collaboration and contribution. Trust must be demonstrated and earned day by day. A single betrayal can be costly and make it hard to regain the same level of trust between the partners. Trust eroding behaviors include: independent action by one partner that has not been shared with the other partner(s); grandstanding at the expense of another partner; not honoring one's word, commitment or confidentiality; creating suspicion in terms of one's motives; or acting in any way contrary to the best interests of the overall partnership. You build trust through the consistency and integrity of your actions over time. And you have to trust your partners in order to be trusted.

29. LEAVE YOUR EGO AND CONTROL AT THE DOOR – The most insidious impediment to good partnerships is the unwillingness or inability of a partner to share power and control. This can be the "Achilles heel" of partnerships. At their very basic definition, partnerships are about shared power, shared vision, and shared responsibility. While one entity may possess a superior position, larger budget, more staff, etc. in a relationship, the execution of the work and credit for accomplishments should not reflect this. This is not about a landlord-tenant relationship. This is about two or more entities working in unity to accomplish important work. A "boss - servant" mentality will lead only to frustration and

unfulfilled promise. Partnerships are about “we” not “I.” They are about creating an equality of importance - an environment where individual personal egos are subservient to the interests of the whole.

This being said, it is important to help your organization understand that partnering does not mean giving up control or influence, nor does it mean that organizations give up their autonomy. Good partnerships represent a delicate balance between maintaining one’s own identity and adding value to a collective effort.

30. UNDERSTAND EACH PARTNER’S MISSION AND ORGANIZATIONAL CULTURE

Every organization has its own culture that is built over time, based on its mission, its practices, its people, its governing values, its traditions, and its institutional history. In any partnership situation, it is important to acknowledge and understand these different organizational cultures, to respect them, and to find ways that these realities can contribute to strengthen the mutual endeavor. The most successful partnerships recognize and value their differences and find ways to integrate them into a workable overarching partnership culture.

31. UTILIZE STRENGTHS OF EACH PARTNER – Each entity in a partnership brings special capabilities, unique authorities, and different flexibilities to further the work of the partnership. As specific needs and tasks are addressed, consider the particular strengths of each partner in determining the most cost-effective approach and who best to accomplish a specific task. Successful partnerships are characterized by a flexible approach to how needs and responsibilities are matched given each partner’s funding, policies, political connections, and other considerations.

32. FIND WAYS THROUGH THE RED TAPE – Partnerships regularly face “red tape” barriers in trying to work across organization lines, especially with public sector partners, which tend to have more regulations. Getting through these barriers and complications takes creativity and persistence. This can lead to heightened frustrations and complications in moving desired work forward in a timely manner. The more entities in a relationship, the more likely that legal, policy, attitudinal, and cultural challenges will be part of doing business. Successful partnerships acknowledge and address these realities up front and take satisfaction in resolving them. Convert your stumbling blocks to stepping stones. Successful partnerships map out the red tape barriers and mobilize whatever it takes to overcome them. It is too easy to point fingers or use these impediments as excuses for derailments and not achieving success. How partners overcome adversity and the institutional complexities of individual partner members will determine, in large measure, the success of the partnership.

33. BUILD STEP BY STEP – It is natural for the partners to want early successes. There is a tendency to look at similar partnership arrangements and their results without appreciating all the steps taken that led to the result. You have to invest to get results and process is important to achieve successful outcomes. Every situation presents a different set of opportunities based on the unique social,

economic and political realities in which a partnership must operate. Much can and should be learned from the experience of others. Good partnerships take a steady investment of time and energy to build and develop. Successful partnerships are built incrementally by starting at the beginning, and growing gradually and tackling more complex initiatives based on the competencies gained from the previous efforts.

Successful partners understand the value of due process and earned vs. instant gratification. They recognize that investment in building the infrastructure necessary to achieve future success is important and are willing to forgo premature success in order to achieve larger, more important long- term gains. “Go Slow to Go Fast.” Partners will grow as far in the partnership as the other partner(s) are willing to help or let them. Challenge yourself and your partners to collectively raise the bar of expectations and advance the partnership step-by-step.

34. **STRIVE FOR EXCELLENCE** – A partnership ultimately gains stature and a reputation based on the quality of the work it accomplishes. The most successful partnerships understand the importance of doing everything well. Build an early reputation for excellence and sustain that reputation. This will be an important factor in how others view your partnership and what doors will be opened to you. People, and potential funders, want to associate with important work and a reputation for excellence. Step back and analyze what you want people to say about your partnership’s work and organizations. This standard then should underscore your strategy, behaviors, and actions to ensure your desired reputation is achieved.
35. **DIVERSIFY YOUR FUNDING SOURCES** – The ultimate success of any partnership depends on the human and financial resources it is able to garner. Successful partnerships develop multiple and steady sources of support, particularly for covering basic operational costs and launching new initiatives. There are many examples where partnerships become too dependent on one or too few sources of financial support. When these sources are reduced or disappear, sustainability of the partnership is jeopardized. Building a more diverse funding base is the best hedge against the vagaries of over reliance on fund sources that may be problematic or undependable from year to year. Develop and periodically update a comprehensive business plan that addresses both near and longer term public and private funding sources, and earned as well as contributed funds that will give your partnership staying power and adaptability.
36. **CONSTANTLY SEEK OUT AND ADOPT BEST PRACTICES** – The best practitioners are those who are a sponge for new ideas and always on the lookout for innovation and creativity that can be adapted to their partnership. Too often, we hear statements such as “We don’t do things that way. We’ve always done it this way.” “It won’t work.” “This is too risky.” “You have to tell them what they need to know.” “Don’t let them set the agenda.” While such cautionary thoughts need to be considered, successful partnerships are open to new ideas and better ways to accomplish their goals. They can readily grasp and adapt best practices.

Overcoming resistance to change is one of the major challenges to partnership success.

Partner entities need to seek ways to build in greater flexibility and adaptability in their structure and work in order to take advantage of “partnering moments.” Establish a work environment in which reasoned risk taking and creativity are encouraged and rewarded and people are willing to risk possible failures in order to succeed. Leaders should act as “champions” with the courage to support experimentation and risk taking and run interference when necessary.

Resourcefulness also characterizes successful partnerships. Work together to identify and engage the abundant human talent residing in most communities to participate in and assist your partnership.

37. ALWAYS BE COURTEOUS AND DIPLOMATIC – Sustaining successful partnerships involves hard work, practiced effectively and consistently over time. It is essential that strong ground rules be established by the partner entities that will govern how the organizations and individuals will interact and treat each other. There is no room for disrespectful behavior. It serves only to tarnish how partners interact and work together. Honesty, respect, courtesy, tact, and diplomacy, should govern partner relationships.

A useful partnering technique is for the partners to define all behaviors that are crucial to sustaining good relationships and then ensure that accountability measures are in place to re-enforce their ongoing practice. Successful partnerships work constantly on developing effective relationships built on trust and a shared commitment to each other’s interests and success.

38. HONOR YOUR COMMITMENTS – Partnership work entails perseverance and follow through by each participating organization and individual. Partnerships require a shared commitment to each other’s success. Sustaining any partnership requires that exciting ideas of interest to the participants actually get executed. Progress depends on each person in the partnership honoring their commitment and following up their words with deeds. When work does not get accomplished, it suggests that the work was not really that important to the individual or organization. This, in turn, builds frustration in the other participants and eats at the mutual trust factor so essential to effective partnering. Successful partnerships address these realities by putting in place reliable accountability measures and regular executive base-touching processes to stay on top of commitments and actions.

39. CELEBRATE SUCCESS – It is a mistake to not take time to formally and frequently celebrate successes. Successful partnerships look for every opportunity to celebrate individual project successes or key benchmarks in the evolution of the partnership. Such celebrations allow the partners to recognize good work being done that re-enforces the goals of the partnership; to gain some outside recognition

of the partnership; and/or to demonstrate possibilities for the partnership to grow. People often are reluctant to take the time to celebrate but invariably are pleased when it does occur. Recognizing and celebrating accomplishments helps motivate and spur people on to new challenges. It is a lost opportunity when it does not occur. If one's goal is to build greater community awareness of the partnership, then the partners need to take every opportunity to legitimately "toot their horns" and market their work and successes. Besides many people who pitch in on partnership do so because they believe in the cause and because it is enjoyable. Celebrating success milestones ensures everybody's "fun-quotient" stays high. Especially when results are going to take time, it is important to have some early successes and milestones to enjoy and celebrate to build a sense of accomplishment and momentum.

40. RESPECT THE RIGHT TO DISAGREE; ACT ON A CONSENSUS BASIS – There are times and circumstances in partnerships where honest differences will surface and where reluctance to take action on a proposal is deeply held and where compelling reasons are presented on why an action cannot be supported. It is important that partners respect these positions with adequate dialogue and understand the basis of the concerns. In successful partnerships, ground rules are established to give each partner a veto power over proposed actions. Partnership work means reaching consensus among the partners. Homework well done should eliminate most of these differences before they become contentious. There simply is too much good work where commonality of support can be achieved for these situations to erode the core working relationship.

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Best Practices of Effective Organizations: ON ONE PAGE

BY MARIANNE PHILBIN

Donors and volunteers are part of the “means” that help nonprofits reach their programmatic “ends,” and the roles they play increasingly require them to make complex decisions affecting nonprofit growth, stability, and effectiveness. Committed as they may be to their favorite organizations, however, few donors, volunteers, or board members actually have time to research current standards in the sector, interview more seasoned peers, carefully follow nonprofit trends, or read textbooks intended for full-time nonprofit professionals.

The day-to-day existence of nonprofits may indeed be dependent on the passionate involvement of civic leaders and community members, but their passion does not necessarily come with extensive background in nonprofit operations or organizational development — or with unlimited time for their nonprofit work.

Sometimes it seems that the more decisions we need our board and volunteers to make, the less time we have to fill them in on what they really ought to know in order to make those decisions properly.

As one business owner newly appointed to a nonprofit board said to me recently, “Okay, tell me everything I need to know about running an effective nonprofit...but keep it to a page.” He was only half-kidding.

In an attempt to rise to that challenge, here is a chart — on one page, as requested — designed to help nonprofit supporters quickly familiarize themselves with the strategies, structures, and best practices that contribute to the development of healthy organizations.

More could be said, of course, about all that contributes to the development of a healthy and effective organization. Over the course of my work with nonprofits, however, I’ve noticed that it’s not the details that

tend to be lost on program officers, board members, major donors, and nonprofit staff. We all do surprisingly well on the details. More often than not, when an organization hits a bumpy patch, it’s because of a misstep back at square one, a fundamental misreading of what’s necessary and appropriate, a wrongheaded notion — in some cases a downright delusion. (The frustrated executive director of one nonprofit I was working with, for example, told me he wanted to “explore alternative models” for his agency. As I worked with him, I learned that what he was looking for was “an organizational model” that wouldn’t require the agency to fundraise or work with a board of directors.)

The chart on the following page offers a quick sketch of the underlying attitudes and approaches that determine the direction of nonprofit organizational growth, and that can often signal whether an organization is headed towards chaos or stability. With our donors and boards, we tend to discuss what we believe about program, but rarely do we discuss what we believe about the rest of our day-to-day work. On what assumptions and around what ideas are we building (or not building) our fundraising program, our communications program, our management and operations strategies? The business of becoming effective organizations requires an awareness of where we stand on all these issues and an understanding of the practices that can best support our development. **GFJ**

MARIANNE PHILBIN IS A CHICAGO-BASED CONSULTANT. HER BOOK, *HOW EFFECTIVE NONPROFITS GET THE JOB DONE: A BRIEF GUIDE FOR OVERLOADED DONORS, VOLUNTEERS AND BOARD MEMBERS* (WRITTEN WITH MARCIA FESTEN), WILL BE PUBLISHED THIS SPRING BY NEW VENTURES IN PHILANTHROPY.

CHARACTERISTICS OF	
LESS EFFECTIVE	MORE EFFECTIVE
NONPROFITS	
Mission, Vision, Program	
Prompted by individual charitable impulse	Prompted by thoughtful, collective decision-making
Program shaped exclusively by <i>service providers</i>	Program shaped equally by <i>service recipients</i>
View of work is broad, mission is vague	Mission is clear, strategic, niche-specific
Tends to serve private interests	Focused on serving public interest
Programs don't tie into mission	Clarity of mission seen in programs
Team, Structure, Governance	
Board and staff roles unclear, melded	Board and staff roles defined, separate
Board micro-manages all functions, even after start-up phase is over	Board sees chief duties as policy-setting, Overall stewardship and financial health
Volunteer development haphazard	Volunteers trained, managed, rewarded
Board believes policies are "implicit"	Board makes policies "explicit" in writing
Decision-making dominated by founders or other small group of stakeholders	Decision-making by board as whole, following established channels and protocols
Board gets involved in hiring all staff	Board only hires ED; ED hires others
Does not keep up with nonprofit standards, or follow widely recommended best practices	Regularly consults and updates policies and practices
Nominations are eccentric and random	Nominations process follows clearly established procedures
Resource Development, Financial Management, Operations	
Budgeting often begins with what the organization thinks it can or should <i>spend</i>	Budgeting begins with assessment of needs, and with what the org. thinks it can or should <i>raise</i>
Organization regularly spends outside budget	Organization uses budget as management tool
Fundraising is scattershot, whimsical, afterthought; often heavy reliance on a few	Fundraising is staffed, annualized, maintained by clear systems and multiple

core donors	strategies
Organization hesitant to invest in fundraising, infrastructure or communications; fears spending on anything but program	Organization understands it must invest in itself to survive and grow; to publicize & deliver programs properly, and to reach out to new constituents
Sees fundraising only as means to budget goal	Also sees fundraising as public education & communications, a way to reinforce program
Exclusive reliance on government and foundation grants	Individual contributors also part of the mix, as well as earned income, corporate support
Few board members make financial contributions, think volunteering is enough	100% board giving, no matter what the level
Frequent crisis cash flow borrowing	Short and long-term financial planning and Cash management policies in place
No one reads, understands the budget or audit	Leadership oversees annual budget, understands what audit conveys
Lives within inadequacies of existing space, often tailoring program to the space	Develops facilities plan so that space can ultimately be tailored to program needs

Evaluation and Planning

Operates "on instinct" day to day	Operates with board-approved Strategic Plan
Progresses by fits and starts, project to project	Develops & regularly consults strategic plan; uses planning as a tool for direction setting
Sees evaluation as a one-time "final report"	Sees evaluation as an ongoing feedback mechanism
Asks only the evaluation questions that a funder wants answered	Determines the questions to answer with input from board, staff, constituents and donors
Describes activities conducted, but never gets to the stage of drawing conclusions	Draws conclusions and makes adjustments in program as a result
Uses only the same people who are directly involved in running operations to evaluate operations	Is as objective as possible, drawing on outside perspectives as well as insider knowledge

Source: *LEVEL BEST: How Grassroots Organizations Can Tackle Evaluation*, by Marianne Philbin and Marcia Festen, Chardon Press. Wiley Publishing, October 2006.

POST-TRAINING ASSIGNMENT

Prior to ninety days after the completion of this program, the employee and his/her supervisor should sit down and discuss the impact and assess the effectiveness this program has had on the employee. Then both the supervisor and employee should login to the Employee Training Management System (ETMS) and complete the Post-Training Evaluation form (an email will be sent to both employee and supervisor notifying them that the evaluation needs to be completed).

The post-training evaluation process is intended to provide a bridge between classroom instruction and the on-the-job application of training. The information obtained through this process will assist the training participant, supervisor, and Training Center in providing a return on the investment the Department has on training.

COOPERATING ASSOCIATION PARTNERSHIP WORKSHOP GROUP 13
March 27-30, 2008

Thursday

March 27

1500- REGISTRATION: (Check-in at Asilomar Administration Building)

Friday

March 28

0800-0815	Program Orientation/MPC Registration	Skinner
0815-0900	Class Introductions/Overview	Mott
0900-1000	Interpretive Trends and Opportunities	Pozzi
1000-1100	Cooperating Association Program Overview/Components	Mott
1100-1200	Legal Authority, Roles, and Relationships	Mott/Davis
1200-1300	Lunch	
1300-1400	Children in Nature Campaign	Gordon
1400-1530	Raising Money and Promoting Parks	Mott
	Appropriate Sales Items	Mott
	Fundraising 101 (Sales-Membership-Events)	TBA
1530-1700	Spending Money	Mott/Kramer/ CCA Representative

Saturday

March 29

0800-0815	Course Objective Review	Mott
0815-0900	Annual Report – Completion and Analysis	Mott
0900-1000	Interpreting Insurance Certificates	Mott
1000-1100	Board Governance (What You Don't Know Can Hurt You)	Reichert
1100-1200	Board Development (A Warm Body is NOT Good Enough)	Reichert
1200-1300	Lunch	
1300-1400	Planning and Shared Visions	Reichert/Armas
1400-1500	Business Plans and Best Practices	Horan
1500-1615	Building Resilient Partnerships	Horan/ Reichert/Armas
1615-1700	Insight and Strategies: Building Commitment	Jackman

Sunday*

March 30

0800-0810	Course Objective Review	Mott
0810-0900	Effective Communications	Mott/Jackman
0910-1010	Money, Motivation, and Membership: Your Introduction to the California State Parks Foundation	Keller
1010-1030	20 Minute (Long Break) for Room Checkout	
1030-1145	New Collaborations: Removing Barriers	Jackman
1145-1200	Evaluation and Adjourn	Skinner

*Checkout of room before 1100

COOPERATING ASSOCIATION PARTNERSHIP WORKSHOP

<u>PROGRAM OUTLINE</u>	<u>20 HOURS</u>
<u>INTRODUCTION AND WRAP-UP</u>	3
Cooperating Association Program Overview/Components.....	
<u>INTERPRETATION, PARTNERSHIPS, AND COLLABORATIONS</u>	6
Interpretive Trends and Opportunities	
Building Resilient Partnerships.....	
Effective Communications	
Money, Motivation, and Membership: Your Introduction to the	
California State Parks Foundation.....	
Children in Nature Campaign	
New Collaborations: Removing Barriers.....	
<u>BUSINESS PLANS, BOARDS, AND LEGAL USE</u>	11
Legal Authority, Roles and Relationships	
Raising Money and Promoting Parks	
Appropriate Sales Items	
Fundraising 101.....	
Spending Money	
Annual Report – Completion and Analysis	
Interpreting Insurance Certificates	
Board Governance (What You Don't Know Can Hurt You)	
Board Development (A Warm Body Is NOT Good Enough).....	
Planning and Shared Visions	
Business Plans and Best Practices	
Insight and Strategies: Building Commitment.....	
TOTAL HOURS	20

COOPERATING ASSOCIATION PARTNERSHIP WORKSHOP

OVERALL COURSE OBJECTIVES

Purpose: Define the organization of, legal authority for, and policy parameters governing the Cooperating Association Program and how this major statewide program relates to their local operations. Describe the critical factors needed to maintain and enhance effective relationships between California State Parks and nonprofit organizations. Receive information that can be shared to implement positive changes within their organization.

Learning Objectives: By the close of the class the participant will

1. Describe current laws governing the Cooperating Association Program and how these laws apply to their local situation.
2. Define the roles and responsibilities between the paid staff and volunteers of California State Parks and a local cooperating association.
3. Identify board of director's governance issues and board development methodologies.
4. Identify the tools available to bring resources to their organization.
5. Increase effective communication and build greater resiliency between the cooperating association and the department.

SESSION LEARNING OBJECTIVES

ORIENTATION/REGISTRATION

Purpose: General orientation and introduction to attendance procedures, meals, lodging and other details of the Mott Training Center.

Learning Objectives: By the close of the session the participant will

1. Review the Training Center guidelines applicable to attending the program.
2. Be formally registered through Monterey Peninsula College.
3. Be prepared to participate fully in class activities.

PROGRAM OVERVIEW/INTRODUCTIONS

Purpose: To build trust and teamwork within the class through understanding the contributions that each person brings to the class.

Learning Objectives: By the close of the session the participant will

1. Be presented with an overview of the Cooperating Association Partnership Workshop (CAPW) course.

STATE PARK INTERPRETIVE TRENDS AND OPPORTUNITIES

Purpose: To provide an overview of major challenges facing California State Parks and ways cooperating associations assist the Department in meeting these challenges.

Learning Objectives: By the close of the session the participant will

1. Describe what interpretation is and highlight interpretive trends in California State Parks.
2. Describe how cooperating associations can best help California State Parks.

COOPERATING ASSOCIATION PROGRAM OVERVIEW/COMPONENTS

Purpose: To help participants understand the current nature and structure of the Cooperating Association Program. Participants will receive an orientation on cooperating association program evolution, history, and authority.

Learning Objectives: By the close of the session the participant will

1. Describe the roles of government, the private sector, and the nonprofit sector.
2. Describe the similarities and differences between a cooperating association and other 501(c) (3) organizations.
3. Describe the major Cooperating Association Program components.
4. Describe major awards and incentives in the program.

LEGAL AUTHORITY, RULES AND REGULATIONS

Purpose: To clarify the rights and responsibilities of State Parks and cooperating associations.

Learning Objectives: By the close of the session the participant will

1. State the enabling legislation for the Cooperating Association and Volunteers in Parks Program.
2. Describe the three-way relationship that exists between the California State Parks (CSP), cooperating associations, and state volunteers.
3. State the authority and responsibility of the CAL function.
4. Describe authorized relationship models between California State Parks and cooperating associations.
5. State three advantages that associations and CSP receive from working together.
6. Describe ways the state may receive gift donations from nonprofit organizations.

“CHILDREN IN NATURE” CAMPAIGN AND CHILDREN’S OUTDOOR BILL OF RIGHTS

Purpose: To provide participants with an overview of the “Children in Nature” campaign and how cooperating associations and the Department could work together to make California State Parks more relevant for children.

Performance Objectives: By the close of the session participants will

1. Describe the plans for the Department’s “Children in Nature” campaign.
2. Discuss how the campaign may involve associations, interpreters, and programs in their district/division.
3. Share information about the “Children in Nature” campaign with people in their unit/sector/district.

RAISING MONEY AND PROMOTING PARKS

Purpose: Using practical examples provide insight and direction regarding fundraising and gaining support for parks.

Learning Objectives: By the close of the session the participant will

1. Explain and discuss key criteria for developing appropriate sales items.
2. Describe the similarities and differences between the “sales area at a visitor information facility” and a “gift shop” and why this is important.

3. Describe practical techniques and tools for retail sales, membership, and interpretive events.
4. Describe tools and techniques to increase sales through appropriate selection and display.
5. Develop a program to increase membership in an association.
6. Gain insights and techniques on how to increase underwriting and community support for special events.

SPENDING MONEY

Purpose: To understand the policies and sideboards that shape how money may be spent in a cooperating association relationship.

Learning Objectives: By the close of the session the participant will

1. Identify appropriate and inappropriate ways for spending money in conjunction with a cooperating association.
2. Describe how a contingent fund may be used.

ANNUAL REPORT – COMPLETION AND ANALYSIS

Purpose: Explain the purpose of and highlight significant aspects of the Cooperating Association Annual Report.

Learning Objectives: By the close of the session the participant will

1. Explain the function and importance of the Cooperating Association Annual Report (DPR 973) and how to properly complete the report and necessary attachments.
 - a. Recognize the components of a properly prepared annual report.
 - b. Describe the requirements for preparing the Calendar Year Financial Summary, IRS 990.
 - c. Describe the use of annual reports in tracking and evaluating performance.

INTERPRETING INSURANCE CERTIFICATES

Purpose: To explain the purpose of and highlight significant aspects of insurance certificates required of all cooperating associations.

Learning Objectives: By the close of the session the participant will

1. Describe the function and importance of an insurance certificate and requirements for these certificates.
2. Recognize the components of a properly prepared certificate, including minimal insurance amounts, and what the two required endorsements should say.
3. Identify the standard ACORD insurance certificate form.
4. Describe the difference between an insurance premium notice and an insurance certificate.
5. Describe the difference between product liability and general liability insurance.

BOARD GOVERNANCE (WHAT YOU DON'T KNOW CAN'T HURT YOU)

Purpose: To explain the role and function of the board of directors of a cooperating association and the major policy and governance issues facing a nonprofit organization. Inspire participants to take steps to apply this information to their organization upon their return.

Learning Objectives: By the close of the session the participant will

1. Describe the major documents of board governance.
2. Describe the major functions, responsibility, and liability of the board of directors.
3. Describe several key governance issues facing a board of directors, including reporting requirements to external entities.
4. Demonstrate knowledge of the rights and responsibilities of cooperating associations as nonprofit corporations.

BOARD DEVELOPMENT (A WARM BODY IS NOT ENOUGH)

Purpose: To provide an overview of the importance of developing an association's board to meet specific needs of the corporation.

Learning Objectives: By the close of the session the participant will

1. Describe the typical life cycle of a nonprofit organization.
2. Describe how to recruit board members with specific skills and talents.
3. Describe different techniques of recruiting potential board members.

PLANNING AND VISION SETTING

Purpose: To develop an understanding of the theory and practice of strategic planning, and vision setting between cooperating associations and state parks.

Learning Objectives: By the close of the session the participant will

1. State what a shared vision/mission is and why it is valuable.
2. Describe how to initiate a strategic planning effort and what factors to consider.
3. Describe the process for developing and maintaining a shared vision/mission between a cooperating association and a state park district.
4. Describe how to ensure that a plan is implemented and not "left on the shelf."

BUSINESS PLANS AND PRACTICES

Purpose: To understand the day-to-day planning and practices necessary for effectively running a nonprofit organization.

Learning Objectives: By the close of the session the participant will

1. Read a financial statement.
2. Describe the theory and practice of cost accounting.
3. Identify the theory and practice of internal controls.
4. Develop an operating plan for increasing earned income.

5. Incorporate budgets into the decision making process.

BUILDING RESILIENT PARTNERSHIPS

Purpose: To explore the best practices and necessary components to maintain successful ongoing relationships with an association and between an association and a CAL.

Learning Objectives: By the close of the session the participant will

1. Describe the role of well planned orientations.
2. Identify specific components in building trust, commitment, and respect.
3. Describe involving the association and park in decision-making processes.
4. Describe how to develop sound practices that support shared visions/missions.

INSIGHT AND STRATEGIES: BUILDING COMMITMENT

Purpose: In a safe environment with peers, discuss questions, concerns, and fears over information presented at this training. Effectively process these ideas and feelings.

Learning Objectives: By the close of the session the participant will

1. Identify Cooperating Association Program concerns.
2. Identify Cooperating Association Liaison concerns.
3. Describe steps to reduce or eliminate these concerns.

EFFECTIVE COMMUNICATION

Purpose: To explore the necessary components to establish and maintain successful ongoing communications between a cooperating association and a CAL.

Learning Objectives: By the close of the session the participant will

1. Describe the importance of meaningful communications in producing a great relationship.
2. Identify specific components in building effective communications.

3. Describe how to involve the association and park in decision-making processes.

MONEY, MOTIVATION, AND MEMBERSHIP: YOUR INTRODUCTION TO CALIFORNIA STATE PARKS FOUNDATION

Purpose: To provide participants with an overview of how the California State Parks Foundation, cooperating associations, and the Department work together to build support and advocate for California State Parks.

Learning Objectives: By the close of the session the participant will

1. Describe the general role of the California State Parks Foundation.
2. Discuss Advocacy Day and how associations may be involved.
3. Describe the Foundation's competitive grant program and how to apply for funding.
4. Describe how the Foundation and cooperating associations have combined efforts to generate support for California State Parks in other projects and venues such as Earth Day.

NEW COLLABORATIONS: REMOVING BARRIERS

Purpose: In a safe environment process thoughts, knowledge and feelings into a realistic plan.

Learning Objectives: By the close of the session the participant will

1. Identify specific actions that could be taken to increase effectiveness.
2. Identify barriers and develop a strategy for overcoming them.

location map for
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