



LEAD PARTNER DESCRIPTION

LEAD PARTNER – INVESTEE LIAISON

Each SVPAZ investee is designated a Lead Partner to serve as their key contact and project manager for SVPAZ. As the liaison between the Investee and the Partners they will be responsible to keep SVPAZ informed of the progress of the project initiatives that have been jointly executed. It is also the Lead Partner's role to involve and encourage other SVPAZ Partners to participate and support these initiatives with their time and talent as deems fit.

GOAL

A "hands on" approach to philanthropy, the SVP investment model includes strong partnerships between teams of our partners and the executive staff of the nonprofits in the SVPAZ portfolio. The **Lead Partner**, along with the involvement and support of participating partners provide business-critical skills to emerging nonprofits in order to help these agencies build their organizational capacity for the future.

LEAD PARTNER RESPONSIBILITIES

Responsibilities of the **Lead Partner** include:

- Serve as point-of-contact person between the Investee & SVPAZ Partners
- Serve as the Project Manager, with the ED of the Investee, supporting and monitoring the individual projects implemented
- Assist the Investee with the completion of various tools: Organizational Capacity Assessment, work plan, project budget, and reinvestment application (*SVPAZ staff will provide assistance/guidance*)
- Act as the "investee advocate" (i.e., be willing to speak about the investee at partner-wide functions as well as provide information to partners or press as needed)
- Attend occasional Lead Partner round table events

PROJECT MANAGEMENT MEETINGS

• **Project Planning**

A Project Planning meeting is generally scheduled within 1 month of the investment or reinvestment decision, the priorities of the organization/project and the resources required for the coming year are determined. The Organizational Capacity Assessment is reviewed and incorporated into the plans. The ED and Lead Partner use the outcome of this meeting to develop the Annual Objectives Agreement and a finalized project budget.

• **Site Visits & Project Updates**

- Routine site visits should be scheduled from time to time
- A site visit should be scheduled at the investee's site for an informal discussion of the progress of the project at the half-way point of the year's engagement; this visit/meeting should include the Lead Partner, one or more Investment Committee members, the Investee's ED and their project manager(s)
- Regular project updates should be presented to SVPAZ and the Investment Committee Members

• **Reinvestment Interview**

The ED and Lead Partner present project results and proposed plans to the SVPAZ Reinvestment Committee for consideration of further funding

TIME COMMITMENT REQUIRED:

3-5 hrs/month (approximately 30hours/year)