

# **SOCIAL VENTURE PARTNERS TAMPA BAY**

**LEAD PARTNER JOB DESCRIPTION**

1. **OVERVIEW**

To achieve an excellent relationship between the partners of SVPTB and a new investee, it is important to have an open line of communication between all parties. It is also important for the SVPTB Lead Partner to have the support and resources needed to accomplish the established goals. In an ideal situation, SVPTB will identify a Lead Partner, who in essence, is the Chair of this Investee Relationship and a Co-Lead Partner who is the Vice Chair of the Investee Relationship. In a typical Investee relationship, the Lead Partner will be supported with other core team members from the Portfolio Team, Communications Team, other partners that decide to participate in the work of the Investee and the SVPTB Executive Director (ED).

1. **JOB DESCRIPTION**

**Primary Duties**

The Lead Partner acts as a project manager and plays a key role in the success of the SVPTB-Investee relationship because the Lead Partner acts as a bridge between SVPTB and the Investee.

The primary duties of the Lead Partner are as follows:

1. Establish a good working relationship with the Investee Executive Director and Investee Board. It is critical that the Investee realize that the role of SVPTB is to work with the organization to maximize their goals and build capacity for long term success. It is not the goal of SVPTB to do the “everyday work” of the organization.

1. Conduct an assessment of how SVPTB can best help the Investee and expand the capacity of the organization. Steps in the assessment, at a minimum, include the following:
2. In depth interviews with the Investee Executive Director, key staff, Board Chair and Vice Chair, and other Board members as appropriate
3. A written assessment to help identify Investee strengths, weaknesses, opportunities, long range goals, etc.; The OCAT (Organizational Capacity Assessment Tool) available to SVP or a modified version of the OCAT are good proven tools to use for this. (Other Lead Partners have done this and are good resources).
4. Develop with the Investee, a formal Work Plan which establishes goals, objectives, priorities, responsibilities, resources, budget, timelines and metrics; (The Portfolio Committee of SVPTB is a good resource for a template on the Work Plan).

NOTE: The Investee Work Plan must relate to the long term strategic goals of the Investee and should identify work that SVPTB can do to really make an impact.

1. Based on the Work Plan, prioritize which tasks will be done in the upcoming year and put together an Engagement Plan for the SVP partners to be involved in the work. The SVPTB Engagement Committee can assist with this task. The Lead Partner should work with the Investee ED or staff to ensure that engagement projects are appropriate and to stagger their timing if necessary. Responsible parties, expectations and evaluation methods should be made clear.
2. Prepare an “Outcomes Report” at the end of the year summarizing what SVPTB and the Investee have accomplished in the year; This information will be incorporated into the Annual Report of SVPTB
3. Maintain on-going relationship with the Investee ( see below)
4. Maintain on-going relationship with the partners of SVPTB about the work ( see below)
5. Ensure that the Investee regularly recognizes the funding and time contribution of SVPTB on its website, programs, events, newsletters, and other appropriate forums

**Relationship with the Investee**

The Lead Partner is in the best position to build and maintain an open, trusting relationship with the Investee. As resource needs or obstacles arise throughout the year, the Lead Partner can work with the SVPTB ED to brainstorm and connect to Partners, other internal SVPTB resources or for assistance outside of SVPTB.

Throughout the year, the Lead Partner is responsible for establishing regular communication (at least bi-weekly) with the Investee ED to ensure ongoing progress toward milestones.

When SVPTB begins planning for its next investment cycle and consideration of future investees, the Lead Partner shall talk with the SVPTB Advisory Committee about funding and the feasibility of continuing to invest in the current Investee for another year. Once these discussions are completed, the information will be shared with the Investee and if future funding is going to be considered, the Lead Partner will advise the Investee of the next steps.

**Relationship with the Partners of SVPTB**

The Lead Partner and SVPTB ED are generally responsible for facilitating an orientation for partners who will be working with an Investee. It is required for the Lead Partner to meet with partners who are going to engage in an Investee project and provide them with an overview of their Investee’s programs and resources, as well as the status of SVPTB’s engagement with Investee and to share with them the Work Plan.

The Lead Partner will be responsible for these tasks:

* Define the respective roles of the Lead Partner and Co-Lead Partner
* Obtain written summaries from the partners after the partners attend meetings or do work with or for the Investee
* Provide a monthly summary at the Advisory committee meetings or by phone or by submitting a report to the Chair so the Chair can give the report ( or supply the written report described below)
* Provide a written monthly summary of activities and documenting progress on the Work Plan including hours worked
* Provide a synopsis of activities or highlights for the SVPTB internal newsletter
* Ensure that team members report their hours worked on various tasks on the SVPTB Hours chart
* Participate in Lead Partner calls with the national office
* Coordinate with the SVPTB Advisory Committee regarding decisions for future funding of the current Investee (As discussed above in the Relationship with the Investee)

Throughout the year, the Lead Partner has regular contact with the SVPTB ED to report on progress and ongoing needs. The Lead Partner also joins the other Investee Lead Partners at periodic meetings to discuss ongoing issues and share information.

1. **SKILLS, KNOWLEDGE & ATTRIBUTES OF LEAD PARTNERS** (COMMON ACROSS THE SVP NETWORK)

* **High level of commitment** to the role as the Lead Partner and to the investee.
* **The ability to effectively communicate with others**, which includes actively listening to others and exploring the “whys” of investee problems and decisions.
* **The ability to coach and/or mentor other** whichincludes being supportive of the person being mentored and the ability to provide positive and negative feedback to investee personnel. It also includes the awareness of how to **not** micromanage or jump in and start managing the Investee and its projects.
* **Ability to build strong relationships** with the Investee Executive Director and Investee staff, especially the ability to create rapport and build trust; the ability to actively reach out, initiate action, ask hard questions and roll up your sleeves to work side by side with the Investee.
* **Professional judgment** in terms of managing the “grey area” between advocating for the Investee and safeguarding SVP’s investment.
* **Project Management skills** to include assisting the Investee in scoping work, prioritizing tasks, coordinating resources, tracking performance to plan and removing roadblocks to plan accomplishment.
* **Some knowledge of how the nonprofit world works** especially how nonprofits differ from for-profit businesses.
* **Cultural competency (sensitivity) to the client base served by the Investee.** The Lead Partner(s) must understand the culture of the clients served by the Investee, take direction from the Investee, and be able to adapt his/her approach to fit the culture.
* **Teamwork** appreciate the importance of building and maintaining strong teamwork across our SVP Partner Team, hold people accountable, acknowledge contributions and encourage team members to offer their best towards our collective efforts.
* **Patience and Pacing** to appreciate the Investee’s engagements and mission related activities may require you to adjust, slow down, revisit assumptions or accelerate to “get it done.”
* **Commitment and recognition that** the role of Lead Partner is your priority and you are prepared to commit your personal time, energy and focus to support a successful investee engagement.