



Lead Partner Team Role Description

The Lead Partner team plays a crucial role in the success of the SVP-investee relationship, acting as the key bridge between the two organizations. Lead Partners are supported by the SVP Executive Director and staff and are also part of a Lead Partner community, both across the global network and within SVP Waterloo Region.

The Lead Partner team wears two main hats:

Lead with Investee

- a) works regularly with the investee's Executive Director to identify areas where SVP can help
- b) prioritizes volunteer projects
- c) helps conduct the organizational capacity assessment
- d) helps set and monitor objectives and outcomes stated in the work plan

Lead with SVP

- a) helps mobilize partners with the passion and/or expertise necessary to complete projects that strengthen the investee (based on the work plan and mutually agreed upon goals)
- b) regularly communicates with the SVP Executive Director (updates, ongoing needs, challenges, opportunities)
- c) provides SVP staff with information to communicate to SVP partners, keeping them up to date on activities, results, and needed volunteer resources
- d) serves as a voice for the investee to SVP, and for SVP to the investee

It is not necessary (or in fact advisable) for lead partners to work on all projects underway at an investee. The lead catalyzes other partners' support.

General Responsibilities

- *Project Definition:* help assess organizational capacity using SVP tools, including the Organizational Capacity Assessment, define capacity-building projects and annual objectives (20%)
- *Project Management:* ensure projects are launched and move along successfully (40%)
- *Volunteer Motivation:* support, recognize and thank volunteers (20%)
- *Vision Building:* help develop a long-term vision for the potential of the SVP relationship (10%)
- *Advocate:* candidly representing investee to SVP during reinvestment process (10%)

Timing – Year One

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Investee Selection												
Lead Partner Selection												
Kick-Off Meeting												
OCAAT												
Work Plan												
Work Begins												

Timing – Subsequent Years

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Annual Reporting												
Reinvestment Committee												
Renewal & Work Plan												

Lead and Vice Lead Partners

SVP’s current approach is to identify one Lead Partner and one Vice Lead Partner. The Lead Partner serves as the main point person for the investee and SVP staff. The Lead Partner and Vice Lead Partner should identify together how they will divide up responsibilities in a way that works best for them and that avoids duplicating roles. For example, the Lead Partner acts as the point person with the investee and SVP staff while the Vice Lead Partner identifies, assembles and orients investee project teams.

Skills Needed

- Excellent interpersonal, communication, and team-building skills
- Able to motivate others
- A belief in the work of the organization
- A good listener
- Ability to act as a sounding board, to quickly assess a situation or challenge, and to provide a gentle nudge when needed
- Organized
- Strong ability to project manage – formal project management experience a plus
- Some experience with managing budgets, developing plans and objectives

Time Requirements

Average 5-10 hours per month. Flexible.

Lead with Investee

The Lead Partner team is in the best position to build an open, trusting relationship with the investee. Initially, the leads work with the SVP ED and investee ED to define volunteer opportunities. The leads should work with the investee to ensure that all projects are truly needed and to *stagger their timing* so that all projects can be realistically completed (and no one is overloaded).

Establishing a healthy and respectful relationship with the investee's Executive Director is critical to a successful SVP investment. Here are some tips for new leads:

- Learn about the organization and its programs – read documents, review website, do a tour if not already conducted, etc.
- Define a plan for working communications and meetings – how often will you meet? Will you set up standing appointment? Will you touch base by email or phone?
- Discuss and identify projects – Choose 2-3 defined projects that will impact the organization (finite projects with near-term, tangible results).
- Ensure that program development and outcomes are not lost. Although SVP aims to strengthen organizational capacity, we are still interested in progress towards programmatic outcomes and client impact.
- Start building a vision for the relationship – what would make the biggest difference in their organizational capacity? Looking ahead five years, what is the next stage of organizational growth that SVP could help them reach?

Organizational Capacity Assessment (OCAT) and Kick-off

Initially, the SVP ED and leads hold a kick-off session with the investee (ideally board members and senior staff) that provides an opportunity for introductions and questions, reviews the investee's successful proposal, as well as the Organizational Capacity Assessment Tool (OCAT).

Following the kick-off, the leads, SVP ED and the investee leadership will define the nature and scope of the coming year's volunteer opportunities (work plan). To the extent possible, these opportunities should be specifically defined, with desired outcomes, particular skill sets, and deliverables defined. A work plan template is provided to the investee (and leads).

Throughout the year

Throughout the year, the leads are responsible for establishing regular communications (monthly is advisable) with the investee to ensure ongoing progress toward objectives.

As priorities change or resource needs or obstacles arise throughout the year, the leads will work with the SVP ED to brainstorm, find connections to outside resources, or simply provide alternative perspectives.

Year-end

At the end of the first year, and annually thereafter, the leads will act as a resource during the investment renewal process. This will include reporting on progress made towards annual objectives, and outlining "capacity building needs" for the investee, and how SVP will partner with the investee in this work.

Lead with SVP

Mobilize Partners

The SVP Executive Director is responsible, once volunteer projects are identified and prioritized, for initiating contact with SVP partners to let them know of strategic projects in need of their support and ask for their assistance. This requires regular communication between the lead and SVP ED so he/she is aware of priority projects in need of assistance. Together the lead partner and the SVP ED can review current partners availability and skill set to match with potential projects.

Orientation

Leads are responsible for orienting SVP volunteers who will be working with an investee. It is useful to hold a “kick-off” orientation as a group session at the investee site with the investee providing an overview of their programs and resources. The purpose is to ensure that the SVP volunteers are 1) familiar with the organization 2) understand their role and expectations and 3) know where to turn for questions and support.

Team Support

Throughout the year, the leads have regular contact with project volunteers through email or phone calls to support their individual efforts, discuss obstacles and help them succeed. To keep the group as a whole connected and motivated, the leads can use a few vehicles including bi-monthly or quarterly update emails or convening 2-3 meetings throughout the year to provide mutual support, opportunities for collaboration and cross-learning and group discussion of the investee needs, objectives and future plans. SVP staff can also assist with this.

Here are some tips to help in communicating with partner volunteers:

- Send group emails to your team of volunteers, cc: SVP ED
- Send emails to all partners via SVP staff to invite partners to volunteer. Time-limited, specific opportunities and requests are best
- Make personal calls or send 1:1 email occasionally
- Keep partner volunteers specifically, and all partners generally, updated on the investee
- Send news about investee’s successes or major changes, including volunteer project needs/updates, every other month to SVP staff
- Share invitations to special events or participate in fundraising events (if comfortable)
- Show appreciation
- Thank you’s – any extra email to your investee or a volunteer will be appreciated (and needed)
- Short email after any key meeting or event you have with investee or volunteer (“...just met with Kristin and here’s all the great things underway...”)

Similarly, it is important to communicate challenges and successes with the investee to all partners. SVP’s ED requests a regular report (quarterly) to include in board and partner communication, and the investee’s file. We will use SVP Connect to ensure there is a working document of the Project Plan as well as share ideas and information with other Lead and Vice Leads.

Liaison with SVP

Leads are responsible for maintaining close contact with the SVP ED, keeping the ED informed of progress or challenges at the investee, and working with the ED to identify SVP partner resources to engage. The leads and ED should meet or speak at least monthly during the first year of an investee's grant cycle.

Communications

It is important that SVP leadership fully understands the nature of engagement at every investee and that SVP's contributions and impact are well documented.

Leads are responsible for completing the following (very short) documents:

- *Engagement Summary*. To record financial and time commitments by SVP partners, friends, and other donors and the measurable impact/outcomes that SVP is helping to accomplish at the investee. To be completed quarterly. The SVP ED should have knowledge of this information as well.
- *Reinvestment Committee Presentation*. Presented to the SVP partners upon renewal of funding vote. To be completed annually (Aug/Sept).

Lead Support and SVP Activities

Leads can use the following opportunities to further strengthen their relationship with investees:

- Participate in an initial kickoff meeting with the new investee to ensure a smooth and timely launch.
- Periodic sessions with other leads to share learning, exchange ideas and learn about local resources
- Communicate with SVP staff to update on progress and problems, identify the best resources or processes, and identify learning for future leads.

Resources

- SVP ED: can help in defining projects, building relationships, the reinvestment process, general support, and partner volunteer matching
- The [Lead Partners Community of Practice](#): regular global network conference calls with other lead partners plus online resources and recordings of past calls
- Local Leads Meetings – periodic SVP Waterloo Region meetings with peers for support and resource-sharing
- Investee and general nonprofit resources on SVP Connect

Sample of key learnings from SVP network leads and investees about this role:

- “SVP brings a sense of opportunities & possibilities instead of restraints” - *an investee*
- “Trust takes time and experience, most funders don't see (accept) our weaknesses and we have to get used to this” - *an investee*
- Working with SVP presents a new mode of interaction that most nonprofits are not accustomed to. SVP volunteer projects often focus internally (organizational infrastructure); this is a shift and takes time from ED or staff.
- Leads often enjoy seeing projects or agency growth from the work they facilitate
- It takes time and patience to learn to work together due to different styles, cultures, funder-grantee power dynamics, and time availability.
- People first, projects next

- Take time to get to know each other and develop a common pace
- Under commit and over deliver
- Start narrow (1-3 areas) and let the relationship build from there