



INVESTEE PROCESS OVERVIEW

Guiding Investees from *SELECTION TO SUCCESS*

	MONTH/DATE	ACTIVITY	RESPONSIBLE	SUPPORT MATERIALS
PREPARATION WORK GOAL: SEAMLESS TRANSITION TIMEFRAME: (OCCURS SIMULTANEOUS TO INVESTMENT COMMITTEE PROCESS)	March/ April	SELECT AND CONFIRM LEAD PARTNER(S)	Staff, in consultation with Investment Chair and Board President	<ul style="list-style-type: none"> LP Job Roles and Responsibilities Document, <i>attention to Skills and Experience Needed</i>
	March/ April	TRAIN LEAD PARTNER(S)	Former LPs, SVP Staff	<ul style="list-style-type: none"> Lead Partner Binder
	April	INVESTMENT COMMITTEE HAND-OFF	Investment Committee Chair	<ul style="list-style-type: none"> Investment Committee Final Selection Report <i>Circulated to: SVP Board, Lead Partner(s), Assessment Team</i>
ON-BOARD/KICK-OFF GOAL: SET EXPECTATIONS AND CELEBRATE NEW INVESTEE TIMEFRAME: 1 MONTH (UP TO 2)	May	INITIAL MEETING–SVP AND INVESTEE <i>A heart to heart meeting that reviews the road map for 3 years, coordinates calendars, positions OCAT, plans for next 3 months, and sets expectations.</i>	Lead Partner(s), SVP Staff, Investee Reps (Minimum - ED, Board Chair)	<ul style="list-style-type: none"> SVP Grant Contract Overview of Engagement OCAT Assessment Overview Roles and Responsibilities Documents for: <ul style="list-style-type: none"> Lead Partner Advisory Team Member
	May	FORM ASSESSMENT TEAM	SVP Staff, in consultation with Lead Partner(s)	<ul style="list-style-type: none"> Roles and Responsibilities Documents for Assessment Team
	May	INTRODUCE INVESTEE TO PARTNERSHIP	Investment Committee Chair, Lead Partner(s), SVP Staff	<ul style="list-style-type: none"> Event Invitations
	May	PRESS RELEASE	SVP Staff	<ul style="list-style-type: none"> Press Release Template

ASSESSMENT GOAL: GAIN THOROUGH UNDERSTANDING OF INVESTEE NEEDS TIMEFRAME: 1 MONTH	May	CONDUCT ASSESSMENT	Investee SVP Staff administers electronically	<ul style="list-style-type: none"> • OCAT Assessment Tool
	May	REVIEW ASSESSMENT RESULTS/ CREATE INVESTEE OCAT EXECUTIVE SUMMARY <i>*Partner Communication Point</i>	Assessment Team, Lead Partner(s), Staff	<ul style="list-style-type: none"> • Assessment Team Guidelines
	May/ June	INVESTEE ASSESSMENT MEETING	Lead Partner(s), SVP Staff, Investee Reps (Minimum - ED, Board Chair)	<ul style="list-style-type: none"> • Investee OCAT Executive Summary
	June	ESTABLISH INVESTEE DATA POINTS	SVP Staff	<ul style="list-style-type: none"> • Investee Data Spreadsheet
	June/ July	DEVELOP VISION, AND LONG TERM GOALS AND OUTCOMES	Lead Partner(s), Investee	<ul style="list-style-type: none"> • Investee Vision, Goals and Outcomes Template
CREATE WORK PLAN GOAL: CLIENT-DRIVEN, HIGH-INVOLVEMENT FROM INVESTEE TIMEFRAME: 1 MONTH	August/ September	BUILD WORK PLAN	Lead Partner(s), SVP Staff, Investee Reps	<ul style="list-style-type: none"> • Work Plan Template • Partner Skill Matrix
	August - October	RECRUIT ADVISORY TEAM (PRE-RECRUITMENT FOR ADVISORY TEAM PRIOR)	Lead Partner(s), SVP Staff	<ul style="list-style-type: none"> • “Help Needed” Announcement • Roles and Responsibilities Documents for Lead Partner, Advisory Team
	October	CONVENE AND ORIENT ADVISORY TEAM	Lead Partner(s), Advisory Team, SVP Staff	<ul style="list-style-type: none"> • Roles and Responsibilities Document for Advisory Team • Meeting Schedule • Investee OCAT Executive Summary • Work Plan Template • SVP Connect Training Instructions

(Continued)	October	LAUNCH WORK PLAN! <i>Appreciate and acknowledge the work you have accomplished so far!</i>	Lead Partner(s), Advisory Team, SVP Staff	<ul style="list-style-type: none"> Announcement to Partners “Help Needed” Announcement (repeat if needed)
BUILD CAPACITY AND MONITOR PROGRESS GOAL: GO SLOW TO GO SMART – “IT’S A MARATHON, NOT A SPRINT” TIMEFRAME: ONGOING, 27-30 MONTHS	Ongoing	CAPACITY BUILDING PROJECTS	Lead Partner, Advisory Team	<ul style="list-style-type: none"> Training Materials Internal Reporting Structure
	December, Year 1	MID-YEAR PORTFOLIO REVIEW <i>LP preps Investee for process</i> *Partner Communication Point	SVP: Portfolio Review Chair, Portfolio Review Committee, Lead Partner(s), Advisory Team, Staff Investee: ED, Board Chair and/or other key staff and board	<ul style="list-style-type: none"> Mid-Year PR Forms & Reports Updated Work Plan
	May, End of Year 1	YEAR-END PORTFOLIO REVIEW <i>LP preps Investee for process</i> *Partner Communication Point	SVP: Portfolio Review Chair, Portfolio Review Committee, Lead Partner, Advisory Team, Staff Investee: ED, Key Staff, Board Chair, Key Board Members	<ul style="list-style-type: none"> PR Forms & Refunding Recommendation Updated Work Plan Data Worksheet, Update with Year 1 Metrics
	December, Year 2	MID-YEAR PORTFOLIO REVIEW AND OCAT PROGRESS UPDATE *Partner Communication Point	SVP: Portfolio Review Chair, Portfolio Review Committee, Lead Partner(s), Advisory Team, Staff Investee: ED, Board Chair and/or other key staff and board	<ul style="list-style-type: none"> Mid-Year PR Form Updated Work Plan OCAT Progress Tracking Tool
	May, End of Year 2	YEAR-END PORTFOLIO REVIEW <i>LP preps Investee for process</i> *Partner Communication Point	SVP: Portfolio Review Chair, Portfolio Review Committee, Lead Partner, Advisory Team, Staff Investee: ED, Key Staff, Board Chair, Key Board Members	<ul style="list-style-type: none"> PR Forms & Refunding Recommendation Updated Work Plan Data Worksheet, Update with Year 2 Metrics

(Continued)	December, Year 3	MID-YEAR PORTFOLIO REVIEW <i>*Partner Communication Point</i>	SVP: Portfolio Review Chair, Portfolio Review Committee, Lead Partner(s), Advisory Team, Staff Investee: ED, Board Chair and/or other key staff and board	<ul style="list-style-type: none"> • Mid-Year PR Form • Updated Work Plan
	May, End of Year 3	YEAR-END PORTFOLIO REVIEW <i>LP preps Investee for process</i> <i>*Partner Communication Point</i>	SVP: Portfolio Review Chair, Portfolio Review Committee, Lead Partner, Advisory Team, Staff Investee: ED, Key Staff, Board Chair, Key Board Members	<ul style="list-style-type: none"> • PR Form, Final • Data Worksheet, Update with Year 3 Metrics
EXIT AND CONNECT GOAL: PLAN FOR FUTURE AND CELEBRATE SUCCESS TIMEFRAME: 3- 6 MONTHS	6 months prior to end of contract	WRAP UP PLANNING MEETING	Lead Partner(s), SVP Staff, Investee	<ul style="list-style-type: none"> • Work Plan • Exit Planning Worksheet
	Feb- March, Year 3	CONDUCT FINAL OCAT ASSESSMENT	Investee and SVP Staff	<ul style="list-style-type: none"> • OCAT Progress Tracking Tool
	March - May, Year 3	REVIEW ASSESSMENT RESULTS AND DATE/ CREATE FINAL INVESTEE IMPACT REPORT	Lead Partner(s), Staff	<ul style="list-style-type: none"> • Data Worksheet (completed) • OCAT Progress Tracking (completed)
	Jan - March, Year 3	DEVELOP PLAN FOR END OF FUNDING AND SUPPORT	Lead Partner, Advisory Team, SVP Staff	<ul style="list-style-type: none"> • Work Plan
	May, Year 3	ESTABLISH ONGOING COMMUNICATION	SVP Staff	<ul style="list-style-type: none"> • Add to Communication Lists
	April - May, Year 3	HONOR AND CELEBRATE	All	<ul style="list-style-type: none"> • Press Release • Communications to Partners • Event Invitation
	May - June, Year 3	WRITE CASE STUDY	Lead Partner(s)	<ul style="list-style-type: none"> • Sample Case Studies

SVP ASSESSMENT GOAL: PROCESS REFINEMENT TIMEFRAME: 1 MONTH TIMEFRAME: 3- 6 MONTHS	June- July, after Year 3	EXIT INTERVIEW AND/OR FEEDBACK SURVEY	Staff	<ul style="list-style-type: none">• Exit Interview• Feedback Survey
	June - July, after Year 3	EVALUATION/ RECOMMENDATIONS FOR SVP PROCESS REFINEMENT	Staff, Lead Partner(s), Board Chair	<ul style="list-style-type: none">• Recommendations for SVP Process Refinement