

SUPPORTING THE EDUCATION PIPELINE

A Business Engagement Toolkit
for Community-Based Organizations



WORKFORCE
STRATEGY
CENTER



Ready by 21 (www.readyby21.org)

Ready by 21 is a set of innovative leadership capacity-building strategies developed by the Forum for Youth Investment. The national experts at the Forum have decades of youth policy experience which they leveraged to make the Ready by 21 strategy the most effective way to help communities improve the odds that all youth will be ready for college, work and life. The Ready by 21 strategy recognizes that effective leadership



is the critical lever to improving health, educational and social outcomes for children and youth. The Ready by 21 strategy is flexible enough to meet leaders where they are and helps focus them on goals and the systems needing to be addressed; challenges them to create a shared vision and agenda; helps leaders build broader partnerships, set bigger goals, use better data and implement bolder strategies; and asks how all stakeholders, including youth, can deliver solutions. The Ready by 21 National Partnership, an unprecedented coalition of organizations is taking Ready by 21 into states and communities across the country. A “dream team” of the country’s most effective agencies, its combined reach is over 650,000 state and local leaders who impact the lives of more than 100 million children and youth.

Corporate Voices for Working Families (www.corporatevoices.org)

Corporate Voices for Working Families is the leading national business membership organization representing the private sector on public and corporate policy issues involving working families. A nonprofit, nonpartisan organization, we improve the lives of working families by developing and advancing innovative policies that reflect collaboration among the private sector, government and other stakeholders.



To create bipartisan support for issues affecting working families, we facilitate research in areas spotlighting the intersecting interests of business, community and families: workforce readiness, family economic stability, flexibility in the workplace, and work and family balance. Collectively our 50 partner companies, with annual net revenues of more than \$1 trillion, employ more than 4 million individuals throughout all 50 states.

Workforce Strategy Center (www.workforcestrategy.org)

Workforce Strategy Center advises leaders who seek to make education and workforce development more responsive to the economy. Founded in 1998, WSC has worked with education, workforce development, and economic development stakeholders in more than 20 states to develop strategies to help students and workers succeed and regional economies grow. A pioneer in career pathways development and implementation, WSC’s research and work in the field of regional sectoral workforce development seeks to promote effective and innovative policy and practice.



United Way Worldwide and Education (www.liveunited.org)

The mission of United Way Worldwide is *improve lives by mobilizing the caring power of communities to advance the common good*. United Way Worldwide invests in the three building blocks of life: health, education and financial stability; and builds social capital for sustainable change. United Way Worldwide works to reach scale and impact social change by increasing public awareness and will. United Way leverages both financial and volunteer resources through a network of nearly 1,800 community-based United Ways in 45 countries and territories. Through local as well as national initiatives, United Way Worldwide enlists millions of Americans to give, advocate and volunteer to make impact on the three building blocks of life. In education, United Way Worldwide strives to shift the trajectory of escalating high school dropout rates through its 2018 goal: to cut the number of high school dropouts in the U.S. in half. United Way’s model reframes education on a birth to 21 continuum and focuses on supportive communities, effective schools and strong families – strategies and approaches rooted in research. United Way will achieve this ambitious 2018 goal by utilizing United Way’s core strengths – a national network, committed partners and public engagement capacity.



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- **United Way Worldwide**
- **Workforce Strategy Center**

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SUPPORTING THE EDUCATIONAL PIPELINE:

A Business Engagement Toolkit for Community-Based Organizations on the Web

A companion website has been created to house background research, tools used by your peers in the field, protocols to help you implement your business engagement efforts, and case studies to illustrate the successes and lessons learned by others in the field. The website is organized according to the four business engagement stages discussed in this document. To help community-based organizations (CBOs) hone in on education initiatives along the cradle to career education continuum, we have categorized resources under five separate stages of education:

1. **Start School Ready to Succeed (0-5)**
2. **Read Proficiently by Grade 4 (6-10)**
3. **Middle School Success and Transitions (11-14)**
4. **Graduate High School on Time (15-18)**
5. **Ready for College, Work and Life (19-21)**

We have begun to populate the website based upon the collective research of Corporate Voices, the Ready by 21 National Partnership, United Way Worldwide, and Workforce Strategy Center. Currently, the website includes:

- **Case studies that highlight the success your peers have had in engaging employers in their efforts**
- **Reports that document effective strategies and the latest research on promising practices**
- **Examples and samples of tools such as meeting agendas, outreach letters, press releases, memoranda of understanding, etc.**
- **Protocols containing questions that will help guide you as you build your business outreach strategy**

Website users will also be able to add examples, protocols, and case studies to expand the knowledge base and share with your peers.



For more information, see www.corporatevoices.org/businessengagement.

EXECUTIVE SUMMARY

The private sector has a vested interest in a quality workforce. They need well-educated, skilled employees to create and deliver competitive products and services. Many nonprofits and community-based organizations (CBOs) are deeply engaged in improving opportunities for youth—especially disadvantaged youth—to help them succeed in college, work and life. Yet too often, these two sectors are either not working together or they are not covering the full spectrum of the cradle to career pipeline.

So how can nonprofits engage the private sector more fully and effectively in efforts to improve educational opportunities for children and youth? And how can nonprofits engage business leaders across the cradle to career continuum?

Ready by 21 is a strategy that helps communities improve the odds that all youth will be ready for college, work and life. The Ready by 21 National Partnership believes that in order to have the greatest impact on improving opportunities for youth along the cradle to career continuum, youth development and education leaders must build broader partnerships with



business. Business leaders are engaged with the youth in their communities, but their efforts often lack long-term focus, strategy and cohesion, which can lead to missed opportunities. Communities will be successful if they engage business in a direct and meaningful way. Long-term, sustainable partnerships deliver the largest impact on a community's goals for youth.

With this in mind, this business engagement toolkit is designed to help community-based organizations recruit, engage, and develop ongoing relationships with businesses in their communities.

Prefacing the actual "how-tos" of business engagement the toolkit addresses the importance of CBO-business partnerships and what motivates businesses to join them. The toolkit itself walks CBOs through the four classic stages of moving people to take action and how these can be used to engage business in education improvement initiatives.

- **IDENTIFY** business leaders who will support your efforts
- **EDUCATE** business leaders about the needs in the community
- **PERSUADE** business leaders to become involved
- **ACTIVATE** business leaders in your efforts'

This toolkit is organized around these four core areas. It breaks the business engagement process into clear, definable steps with suggested activities CBOs can undertake to launch an effective initiative, grow support for existing work, or launch a campaign to establish and maintain effective business partnerships. We will walk you through the four stages and offer tips and tools for following through.

A companion website has been created to house background research, tools used by your peers, protocols to help you implement your business engagement efforts, and case studies to illustrate the successes and lessons learned by others in the field.

For more information, see www.corporatevoices.org/businessengagement.

OVERVIEW

America faces a profound challenge to its economic vitality and future. In today's global economy, our nation's success depends more than ever on the skills of our workforce. Yet too many of our young people are not prepared for the global marketplace. Their lack of skills not only impacts their own chance at success in life, it threatens our nation's future prosperity.² ►

Even during this time of high unemployment industries such as health care, advanced manufacturing, and energy report being unable to find a sufficient number of qualified workers to fill open positions. According to a recent survey by the Human Capital Institute and The Ladders, more than half of responding human resources recruiters say that among their greatest challenges to filling employment rosters include the "quality of candidates" applying for open positions.³

And if businesses are having difficulty finding the right talent today, what will they do tomorrow? Based on retirement, dropout, skill, and demographic figures, some economists predict a labor shortage of more than 35 million skilled and educated workers by 2030.⁴ Retirement alone will impact 70 million Americans and their employers over the next 10 years.⁵ Without enough skilled workers, these jobs will disappear or be filled overseas and today's high unemployment rate will continue to grow.

SOME SOBERING FACTS

- One-third of all children do not graduate high school on time.⁶
- In some large urban districts, only one-half of the students graduate on time.⁷
- Approximately one-half of high school graduates are considered to be academically prepared for postsecondary education.⁸
- Businesses say more than 50 percent of high schoolers lack the written, verbal, critical thinking, and problem-solving skills they need.⁹
- Studies show that 20 percent of today's workforce is functionally illiterate.¹⁰
- Jobs requiring postsecondary education will grow by 17 percent – nearly double the rate of jobs that do not require such a credential.¹¹

READY BY 21: HOW DO WE IMPLEMENT WHAT WE KNOW WORKS?

Ready by 21® is a set of leadership strategies that help communities to ensure that strong supports and services are in place for children from birth through adulthood by helping them in building broader partnerships, setting bigger goals, adopting bolder strategies, and using better data.

Created by The Forum for Youth Investment, Ready by 21 is dedicated to helping communities and the nation make sure all young people are ready for college, work and life by focusing supports on children and youth from birth through early adulthood and *across* developmental settings. Simply put, increasing the number of young people that successfully navigate the education pipeline will require that communities also pay attention to the “insulation” or supports that they need outside of school. This includes basic needs (e.g. housing, healthcare, transportation) and high-quality learning and engagement opportunities (e.g. afterschool programs, internships, mentoring). [See the Workforce Readiness Pipeline graphic below.]

Ready by 21 is dedicated to helping communities and the nation make sure all young people are ready for college work and life.

To accomplish this goal, the Ready by 21 National Partnership, which represents organizations involved with the welfare and education of more than 100 million children and youth in the United States, offers leaders tools to change the way they work together to prepare children for success in life.

THE WORKFORCE READINESS PIPELINE¹²



READY BY 21 AND THE NATIONAL PARTNERSHIP

Ready by 21 is a strategy that helps communities improve the odds that all youth will be ready for college, work and life. Ready by 21 is fueled and delivered by an unprecedented coalition of organizations representing government, education, nonprofit, business, research and philanthropy. This Ready by 21 National Partnership has been galvanized to take this strategy into states and communities around the country. United Way Worldwide is the signature partner, joined by mobilization partners American Association of School Administrators, America's Promise Alliance, Search Institute, Corporate Voices for Working Families, the National Collaboration for Youth, and the National Conference of State Legislatures. Combined, the National Partners reach over 650,000 state and local leaders who impact the lives of more than 100 million children and youth.

Ready by 21 Technical Partners, who offer leaders state of the art, competitively priced on-the-ground tools and incentives, include Child Trends, Community Systems Group, SparkAction, David P. Weikart Center for Youth Program Quality, The Finance Project, The Gallup Organization, nFocus Software and Results Leadership Group, LLC.



For more information on Ready by 21 and the Partnership please visit www.readyby21.org.

With this in mind, this business engagement toolkit is designed to help community-based organizations recruit, engage, and develop ongoing relationships with businesses in their communities.

The Ready by 21 National Partnership believes that in order to have the greatest effect in improving opportunities for youth along the cradle to career continuum, youth development and education leaders must build broader partnerships with business. Business leaders are engaged with the youth in their communities, but their efforts often lack long-term focus, strategy and cohesion, which can lead to missed opportunities. Communities will be successful if they engage business in a direct and meaningful way. Long-term, sustainable partnerships deliver the largest impact on a community's goals for youth.



With this in mind, this business engagement toolkit is designed to help community-based organizations recruit, engage, and develop ongoing relationships with businesses in their communities.

WHY PURSUE NONPROFIT-BUSINESS PARTNERSHIPS?

Community-based organizations have much to gain from partnering with business and business leaders to support efforts promoting literacy, education, and effective workforce preparation. While most CBOs tend to turn to the private sector primarily for financial support, as partners, businesses can significantly augment community-based efforts by playing important roles at the local, regional, state or national levels. Business partners can serve as:

- **Powerful champions** – whether it is a visible community role, behind-the-scenes with decision makers, or elevating the issue within their own companies, among their industry peers, and with governmental agencies.
- **Strong advocates** – the voice of business is especially convincing with legislators, funders, and local citizens.
- **Change agents** – as school board members, community college trustees, members on a workforce investment board or on your board of directors.
- **Fundraisers** – to increase the resources needed to supply children, youth, and young adults with services, tools, and supports.
- **Mentors/Tutors** – business leaders and their employees play a critical role in helping students to understand what is expected in the workplace.

FIVE STRENGTHS NONPROFITS CAN GAIN FROM BUSINESS PARTNERS

The Council of Competitiveness describes five categories of business qualities that can be leveraged in a meaningful partnership. These could also be viewed as 'value adds' that business offers to the education improvement cause:

- **KNOWLEDGE** such as information about the critical skills and competencies that young people need to be successful in the workplace.
- **PLANNING AND OPERATIONAL EXPERTISE** which may be helpful in program design, implementation, and marketing.
- **RELATIONSHIPS AND CREDIBILITY** which may be leveraged in seeking financial support, promoting programs with other businesses or policymakers, and in the recruitment of participants.
- **ACCESS TO RESOURCES** such as their employees as volunteers, space at their facilities, equipment or other in-kind items to be utilized by community-based organizations, their clients, or financial resources from the company itself or corporate foundations.
- **ORGANIZATIONAL CULTURE** from which community-based organizations may benefit. They are often entrepreneurial and will emphasize action. They may also be more comfortable with a new strategy or venture as long as the results of those new efforts are being measured and evaluated.¹³

There are some obvious benefits to any business that allies itself with a community's endeavors to improve the lives of young people. Here are some motivators:

- **A new focus for new leaders** – When companies undergo mergers or leadership transitions, there is often a new urgency to put the company's stamp on an issue. Partnering with a nonprofit on a new project or philanthropic focus can build goodwill, enhance the company's reputation, and expand networks.
- **Building the workforce pipeline** – Companies are often motivated to partner with CBOs as a way of supporting the company's current workforce requirements or to cultivate their workforce of the future. Often the business leader is seeking to diversify their workforce, hire local talent or recruit employees with credentials relevant to the business needs.
- **Increased share of the market** – Is there a bottom line that needs boosting? Does the company want to reach out to new geographic or demographic markets? In either case, there may be an opportunity to boost corporate sponsorship of an issue-related product (like a scholarship) that supports education.
- **Visibility** – A company may want to get involved in a community issue because it wants more visibility on non-business issues (or wants to change the public conversation, for whatever reason). Often, companies seek out visible platforms for their emerging leaders in community activities as one way to do that.
- **Social welfare** – Many companies are taking stock of their community work and realigning it to make sure it gets at the root causes of social problems in communities where the company and its employees are located.
- **Employee engagement and retention** – Company support for community issues can enhance employee motivation and morale, thereby strengthening employee loyalty and retention. In fact, research shows that companies that help employees volunteer with nonprofit organizations could have a leg up in recruiting Generation Y (18-to-26-year-old) talent. Nearly two-thirds (62%) of the respondents in the 2007 Volunteer IMPACT survey by Deloitte & Touche said they would prefer to work for companies that give them opportunities to contribute their talents to nonprofit organizations.¹⁴

Each of these scenarios presents an opportunity for a CBO seeking to partner with the business community. It all points to how important it is to research your local businesses. Know what interests them—what they are looking for in an education partnership, what problems they are trying to solve—and then present them with a solution. Business leaders want to make a difference. They may be driven by a desire to boost economic, workforce or early childhood development, or have a passion to engage more deeply in community change. But at the end of the day, businesses that maintain long-term partnerships ordinarily do so because they are addressing a basic business need.

However they are motivated, and however motivated they may be, it is important to remember that a business' level of engagement will likely vary depending on the commitment of the CEO, corporate philanthropic priorities, the perspective of its top leaders, and the economic climate.

But at the end of the day, businesses that maintain long-term partnerships ordinarily do so because they are addressing a basic business need.

THE ESSENTIALS OF BUSINESS ENGAGEMENT

Whether it is grassroots organizing or political campaigning, experts in moving people to action say there are four basic and sequential stages of engagement ►



This toolkit is organized around these four core areas. It breaks the business engagement process into clear, definable steps with suggested activities CBOs can undertake to launch an effective initiative, grow support for existing work, or launch a campaign to establish and maintain effective business partnerships. We will walk you through the four stages—shown here—and offer tips and tools for following through.

Many of the strategies noted in this toolkit are adapted from *Born Learning, Making the Business Case User Guide*. United Way Worldwide, a Ready by 21 partner, launched the public engagement campaign to help parents, caregivers and communities create quality early learning opportunities for young children.

IDENTIFY

Remember to consider your long-term goal(s) before you launch a partnership, initiative or program. Get clear what you are trying to do, to what end, how, and with whom. Make sure you have a clear mission and vision for what you are attempting to accomplish. What outcomes are you looking for? When seeking to engage business in a partnership a thoughtful approach should involve taking a 360-degree view of all the potential resources at your disposal. Look inside your own organization, at your strengths and needs, and outside, at the businesses in the community that can help you to achieve your goals.

STEP 1. IDENTIFY INTERNAL STRENGTHS AND CAPACITIES

Corporate leaders are hesitant to enter into a collaboration with a partner that cannot demonstrate it has the capacity to make the partnership effective. The issue of capacity is critical for corporate partners; because collaboration is a business risk, they need to have confidence that the nonprofit partner has the capacity to deliver on its part of the partnership.¹⁶

What is your organization's capacity to support your mission and vision, and reach your goals? Consider the strategic direction for your organization. Develop a specific work plan including the timeline and the resources you have for reaching your goals.

STEP 2. IDENTIFY WHAT YOU NEED

In preparing your work plan you will likely find capacity gaps in terms of the amount of staff, dollars, products, services, or the expertise required to complete the work. You may want to think about how a business leader can contribute to the achievement of your mission through their contacts, expertise, advocacy work, or financial resources.

STEP 3. IDENTIFY LEADERS TO SUPPORT YOUR EFFORTS¹⁷

Next, think about who you are targeting. Who do you want to engage? Are they the businesses that could have the greatest impact on the success of your education work?

- **WHO DO YOU ALREADY KNOW?** ► Take a close look at your circle of influence and those of your organization, board, and staff. Make a list of all the “movers and shakers” in those circles, including former board members (and their circles of influence), donors, board members of any relevant organizations, any community partners, sponsors, or anyone who has spoken out for your organization or cause. Add the CEOs and key leaders of every business that has ever supported your organization and its causes in any way. Do not forget business leaders whom you, your staff, and board may know through volunteering, school connections, and your church, temple, or mosque.
- **WHO DO YOU NEED TO KNOW?** ► Connect with organizations that already convene business and business leaders and deal in the education and workforce readiness fields. Such organizations include local business coalitions, local workforce investment boards, and higher education institutions (community colleges and universities). Be sure to include the leaders of the Chamber of Commerce or other local economic development groups. Many business leaders are already active in education, so include those who lead local education foundations or have served on school boards, workforce development groups, or other education commissions. Do not forget media influencers. Heads of media organizations are usually active in civic affairs, so add newspaper editors and publishers and radio and TV station general managers to your list.
- **WHAT DO YOU NEED TO KNOW?** ► Once you have created a list of potential partners, find out everything you can about them. Look at their websites, read their annual reports, and research press articles about their activities. But don’t stop there. Consider also specific business leaders who could support your cause. What types of activities have they sponsored in the past? Which causes interest them? Who are their partners? What do they need that you can address? No sense approaching a company that will not support your cause.
- **WHAT IS YOUR EDGE?** ► Sometimes it is not a what, it is a who. In this case, your allies are your edge. Identify the most prominent, well-respected business leader already on your team and engage them in this effort.

ACTIVITIES

1. Develop a work plan.
2. Create a list of the resources you have to offer based upon your programs and services. Include in the list data points which demonstrate the success rate of your programs.
3. Develop a list of the resources you need based on the gaps identified in the work plan.
4. Research area businesses to determine which companies would be the most likely to benefit from joining your effort.
5. Create a list of potential business partners and the issues of greatest importance to them.
6. Create a Business Interest/Initiative Need matrix that lists the companies and their interests alongside the list of initiative needs you have identified.

EDUCATE

CBOs will need to educate business partners by making the case about their issues and clearly stating what is at stake in order to gain buy-in from business leaders.

BUILDING THE BUSINESS CASE¹⁸

Business leaders like facts—but not encyclopedias. They need a snapshot. What problems are facing children and youth in your community or state? What proof do you have that children are coming to school unprepared, not reading at grade level, disengaged, dropping out, and not entering or completing postsecondary education or job training? How are these issues affecting your local community? Their businesses? What are the solutions to these problems?

- ❑ **GET THE FACTS** ► Facts that highlight the problems facing young children in your community are powerful. Telling a business leader that “for every 100 students who enter ninth grade, 48 will enroll in college and only 18 will graduate in four years¹⁹ and that by 2018, 30 million new and replacement jobs, including those from your company, will require some college or above²⁰ is more compelling than saying “We need to do more to help young adults obtain a postsecondary education credential.”
- ❑ **MAKE IT RELEVANT** ► Build on “hot topics” in the media and your community and tie them to your issue. For example, if postsecondary education completion rates and English language learners are generating debate, education goes to the heart of both. Use those topics to connect to your issue. High-quality early learning programs (supported by strong families, strong communities and good health) have been able to make the connection to increased high school graduation rates, better job skills, increased home ownership, fewer teen pregnancies and declines in criminal activities.
- ❑ **MAKE IT PERSONAL** ► If you have done your research, you know what makes your business leader tick. Frame your snapshot the same way. Connect your initiative—whether it be the achievement gap, declining college attendance, or a desired economic foothold in a certain industry—to business’ interest.
- ❑ **WELCOME THE COMPETITION** ► To succeed in business is by definition to win a battle in the marketplace, so be sure to use the competitive nature of business to your advantage. Highlight comparisons. Is your community 18th across the state in low-performing school districts? Is your state 49th in child well being? Is your state ranked 28th in the number of jobs created every year? Use data to underscore the case you are making.
- ❑ **USE DATA SOURCES** ► Keeping in mind how important it is to make your case local, you will want to develop local data points. In addition to national figures you will want to include those figures that represent your local economy, demographic situation, and school system. There are a variety of sources for both national and local information. The list below will provide you with a starting point to mine that information.
 - **Local school systems** collect data on standardized testing results, achievement tests, SAT results and other indicators of student and school performance.
 - **State departments of education** gather statewide student, school, and district performance data.
 - **State departments of labor and/or economic development** frequently contain information about the local employment or unemployment rate, the economic situation by industry sector and projections of future employment. They also report on education levels of area residents.

- **Kids Count** is an annual snapshot of data describing the state of children, with your state's data broken out. (www.aecf.org/kidscount/databook)
- **Children's Defense Fund** is a national children's advocacy organization with national snapshots of census and issue data, state offices, policy analyses, and research papers on many youth issues. (www.childrensdefense.org)
- **Federal Interagency Forum on Child and Family Statistics** is an Internet compilation of statistics and reports on children and families, including population and family characteristics, economic security, health, behavior and social environment, and education. (www.childstats.gov)
- **U.S. Department of Education** periodically issues reports about the academic performance of U.S. students.²¹ (www.ed.gov)
- **U.S. Department of Labor** captures major economic indicators and labor market projections through the Bureau of Labor Statistics.²² Unemployment statistics are also available.²³ (www.dol.gov)
- **Alliance for Excellent Education Promoting Power Database** compares the number of 12th grade students in a school to the number of 9th graders three years earlier. It is designed to estimate the proportion of high school students who make it to their senior year. (www.all4ed.org)²⁴

Other sources might include local United Ways, which collect local data about community needs and resources; local community foundations and other foundations' reports; as well as local colleges and universities.

ACTIVITIES

- Gather and compile local information that illustrates the need for local action.
- Create a one-pager that clearly demonstrates the facts.
- Create a business case for why businesses should take action.

PERSUADE

Now that you have given your target businesses reasons to become involved in your initiative, you have to demonstrate that their involvement will benefit their bottom line.

You have to be sure you know what you have to offer businesses. What opportunity are you "selling" them? Is it a chance to be identified with an issue that is important to them? Will it boost their sales? Could it help them to build their workforce pipelines, retain employees, or make their places of business and their employees' homes safer? How will their involvement offer them a return on their investment?

WHAT IS YOUR MESSAGE TO BUSINESS?

As we said before, the key to winning business buy-in is to speak to the business' specific interest. Remember, to obtain a commitment that goes beyond the symbolic, CBOs must articulate the benefits of businesses' involvement in ways that show potential for meeting bottom-line business needs or goals.

Business leaders understand the connection between education and workforce development. They've long been supporters of strong schools because they know a productive workforce and a strong economy are linked to school success.²⁵

Use the business case you have already created to make your argument. Pulling from your research, tell them why the issue is relevant to them. Your need should be sold as an opportunity for potential business partners to reach their goals. Create a sales strategy that keeps both your and their interests in mind. It should be a win-win opportunity for all involved.

Again, business leaders are best persuaded with facts. Your goal is to persuade business leaders to act on your issue. This requires spelling out the urgency and what is at stake. This is the place to lay out the implications of failing to act.²⁶ What do you want the business leaders to do? Why? What is the payoff for them? What will be their return on investment? Make it easy for them to say yes and hard to say no. You need concrete information about what strategies are working now to address the problems you have raised. Use these to discuss ways you would like to involve them, but invite them to suggest alternative actions they might prefer to take.

ACTIVITIES

- Develop a “cheat sheet” or script which clearly lays out the facts that you can use as talking points with each of your targeted businesses.
- Create a sales strategy for each of your target businesses. Create a message or “sales pitch” for each type of involvement and each potential partner. Include information on how their involvement as a partner will benefit the company. If applicable, demonstrate how their investment will reap future benefits. Use financial data where possible.
- Develop a list of examples of strategies that are working to address the issues you have raised.
- Develop PowerPoint presentations to use when visiting potential business partners.
- Create a brochure or fact sheet as a leave behind.

Examples of presentations, brochures and how to present returns on investment are available on the Business Engagement Toolkit website. (See page 1.)

ACTIVATE

However you make your case, make sure you have a strong call to action. Too many organizations build a strong argument, but fail to make a concrete ask.

MAKE THE ASK

In advance, determine a list of ways leaders can get involved. Be prepared to describe the involvement: volunteering time, helping to develop a marketing plan, hiring interns, or donating money or equipment, for example. Have specific targets regarding what you are seeking, but remember to be flexible and willing to work with business leaders to shape their involvement so that it is a win-win for you and for them.

Make sure you have a simple, clear actionable request. Make sure it is relevant, doable, and meets the business leader where he/she is. Businesses can play many roles in community efforts to support young children, older youth, and their families. Some businesses are comfortable contributing to the general support of children and youth issues. Some are better suited to advocate for specific policies.

“We need partnership with NGOs. [...] If we’re going to get something done in the communities we work in, we need to work in consortium.”

–Chuck Williams,
Chairman and CEO, Unocal²⁷

POTENTIAL ACTIVITIES FOR BUSINESS PARTNERS

It is worth your time to do the research in advance so that you can develop a menu of potential activities for your partners according to how involved you think they might want to be. The list below lays out some sample requests you might make along three degrees of involvement: light touch, medium touch, and high touch.

LIGHT TOUCH

- Attend a meeting
- Sign a letter of support
- Volunteer at an event

MEDIUM TOUCH

- Participate on an advisory board or taskforce
- Print a brochure or educational materials
- Recruit peer businesses for an event or donation
- Present or speak at a local function
- Write an article or editorial

HIGH TOUCH

- Make a financial contribution (have a number in mind)
- Provide technical expertise for the development of a website
- Join the Board of your organization
- Donate staff time and/or physical space

NOW THAT THEY'VE SAID YES

Your outreach efforts and preparation have paid off. The business leader or industry group convener has agreed to meet with you. What is the best venue in which to make your case? It may be a speaking opportunity or a well-planned event. Here are some suggestions:

- Schedule one-on-one briefings with individual business leaders over morning coffee to lay out the challenges in your community.
- Give a presentation to the Chamber of Commerce's education, workforce and policy committees, which often meet quarterly on key topics (and usually form the basis of advocacy agendas for the next year).
- Get on agendas of business organization meetings, such as Rotary, Kiwanis, Lions Club, women business leaders, or local chapters of professional organizations for major employers in your community, such as the American Bankers Association or the National Association of Manufacturers.
- Invite a small group of business leaders to a special breakfast briefing.

Whether it is a one-on-one meeting or a presentation to the Kiwanis Club, your message is the same.

- Lay out the facts, make your business case, respond to their questions and make your ask. Stick to your message.
- Be sure to state clearly and demonstrate that your organization is up to the task.

- Review the reason for your meeting and the agreement you came to at the end.
- Collect contact information.
- Follow up with a thank you note or email, offering a time when you will check in with them again. (See sample letters, meeting agendas, and PowerPoint presentations on the Business Engagement website.)

PREPARE BUSINESS LEADERS²⁸

Do your homework before deploying your new champion. You are asking a lot of your business champions. By making your request easy for them to accomplish, you show your business partners that you value their time, which will be important when making future requests. It is your job to do the advance work and to properly equip them.

- Do not expect them to find out where and when the next Kiwanis meeting is—do your homework, and make that part of your “ask.”
- Draft the remarks, but find out from the business leader’s staff or assistant how they typically like such information provided. Do they prefer outlines? Talking points? Full-fledged speeches?
- Also, ask the staff or assistant whether their boss likes to be briefed in person or by email. Some CEOs prefer a briefing paper, with relevant background and articles attached.
- Do not let your partner get blindsided. Brainstorm possible questions from the audience (including “hot button” topics) and create a Frequently Asked Questions backgrounder. Provide succinct, relevant background so he/she has context but does not drown in detail. Provide these materials as far in advance as you can.

ACTIVITIES

- Create a list of specific ways the leaders you are targeting can get involved.
- Develop a hand-out that explains each type of involvement. For instance: What opportunities are there for volunteering? Explain what tutoring and mentoring mean. What are the time commitment requirements? Are there resources to help volunteers? What are the qualifications volunteers need to meet? Is financial support needed?
- Develop briefing materials for business leaders for each event for which they have a role.



AFTER A BUSINESS IS ENGAGED

Engaging business is the first step to creating a partnership, but the work doesn't end there. If you want the partnership to be effective, and to endure through good times and bad, you have to be prepared to maintain the relationship for the long haul. It is an ongoing process—one that can reap untold rewards. Most important, it can result in tremendous gains for our children, our communities, and for our future. ▶

BUILDING EFFECTIVE BUSINESS PARTNERSHIPS

Successful business partnerships can offer great benefits to community and educational programs. However, undertaking these efforts can present real challenges to community-based organizations. Those with experience working with business partners agree that success, level of commitment, and continued business involvement are largely built on relationships.

Success depends on the details: how a business leader is approached, what role they are asked to play, how the CBO has bridged the “cultural divide” between nonprofit and private sector worlds, and how those relationships are attended to, maintained, and sustained over time.

UNITED WAY OF NORTHEAST FLORIDA

Case Study

For their Graduation Now Business Leaders Breakfast and Workshop, Jacksonville's United Way of Northeast Florida (UWNEFL) created a Business Involvement Opportunities Forum. It offered participants a choice of opportunities to assist schools by helping students graduate and lead productive lives. These proven strategies included, but were not limited to: mentoring, tutoring, sponsorships, advocacy, and parent engagement. UWNEFL collected Response Cards at the event to immediately capture participants' commitment to the call to action UWNEFL issued at the event.

Building CBO-business partnerships is no easy task. Even with strong relationships, coordinating and managing business involvement can pose hurdles. In a study conducted by Corporate Voices to understand CBO-business partnerships, interviewees on both sides agreed there are four basic elements of effective partnerships.²⁹ They are:

1. **A common problem and a shared mission and goals**
2. **A clear understanding of roles and expectations**
3. **Trust and respect for the credibility and capacity of partners**
4. **Leadership and dedicated staff to manage the collaboration**

To make sure these bases are covered, spend time up front discussing the problem to determine if there is a common understanding of the issues. Encourage your business partner to review your organization's mission and goals. Seek agreement on what your common goals should be. Once these are clear, make certain your business partner understands what you expect from them. Agree on what roles they will play and put it in writing to avoid miscommunication.

Build partnership trust. You and your partners each have reputations based on previous work in the field. Build on them. The trust is more likely to come from time spent together, getting to know one another, and the strengths each brings to the table.

Finally, make sure your CBO-business partnerships have the support of leaders within your respective organizations. Dedicated staff act as a bridge or liaison within your organization as well as across organizations to ensure resources are tapped and the work continues. If you say you will deliver by a particular date, deliver. If that is not possible, update your partner on why this is the case and provide a revised timeline.

SUSTAINING RELATIONSHIPS

A long-term engagement strategy is the key to building a cadre of enthusiastic sustained business supporters. Recognize that your business partners will stay around the table and contribute as long as their needs are being met. You will want to clearly understand their needs, build a plan to meet those needs, and check in with your partners periodically so you know when their interests change or evolve. When your business partners help you, be sure to recognize them in a way that is meaningful to them. Be sure to measure your progress, report on results, and be willing to change course if your plan is not working. The bottom line is that you cannot sustain a partnership relationship if you cannot deliver on your promises.

"It's really important to narrow down exactly what you're both trying to accomplish, where your interests overlap, and who bears what costs. You've got to be very, very explicit up front on both sides about what you really want out of the relationship."³⁰

—John Sawhill
The Nature Conservancy

KEYS TO SUSTAINING SUCCESSFUL COMMUNITY-BASED ORGANIZATION/BUSINESS PARTNERSHIPS

Develop a clear understanding of roles and expectations. Agree from the start on your work plan. What are the tasks, timeframe and role each partner will play? Put the work plan in writing and develop a written agreement. By documenting the roles and responsibilities of each partner, you will be able to institutionalize your partnership with the business. In this way, the partnership is not dependent on personalities, or just one individual at the company, but the way you conduct business with one another.

Plan ahead. Look at your calendar of events for opportunities to engage and involve business partners. Share a list of those activities and dates with your business partners. Business leaders want to stay engaged in activities that make a difference to them, but they need to plan ahead.³¹

Demonstrate appreciation for business leader efforts. Whenever a business speaks out on behalf of your common cause, thank them! Easy ways to recognize them publicly include acknowledging them at your board meetings, in your newsletters, on your website (and theirs), and at partner board meetings. You can also pursue a nomination for an existing award in your community. If you want to take a higher profile, consider creating a “Champions for Children” or other such types of awards from your organization. *Working Mother Magazine* recognizes the best family-friendly business each year, so consider tying any recognition to its time frame.³²

Maintain communication.

It is vitally important to stay in touch with regular email or other updates on education/workforce readiness issues. Keep your communications brief.³³ Determine a protocol for providing and collecting feedback from your corporate partners. Check in with your business partners following their participation in a meeting, event or other activity. Find out how it went for them, and ask for their suggestions for improvement. If you receive those suggestions, implement them as long as they make sense given your program and resources.

Business leaders
want to stay
engaged in
activities that make
a difference to them.

Track and measure progress. Work with your corporate partners to set goals for your partnership. Agree on outcomes and timeframes for achieving goals. Collect data on client participation or completion of programs. If businesses are involved in a career preparation program, follow client placement and retention. In addition to quantitative information, collect qualitative information. Have regularly scheduled review meetings to ensure expectations are being met. These can be face-to-face meetings or conference calls during which time progress is discussed. Ask for their input or suggestions in order to improve or expand the partnership. What is important with this data collection is how you use it to ensure that your programs and partnerships are continually being improved so they are meeting the needs of all parties involved.

Deliver results that matter. “No different than any other business unit, corporate social responsibility professionals and corporate philanthropists must demonstrate results that resonate with the business. Rather than buckling under the pressure of near-impossible-to-achieve results like increased revenues, focus on intermediate outcomes that social investments can contribute to directly and that are relevant to the business. These include increasing brand awareness among a specific customer group, reducing cost in a specific business unit or incrementally improving corporate reputation along a specific dimension.”³⁴



We have prepared this toolkit to help define the steps for developing effective nonprofit-business partnerships. A case study of how these steps can be used is provided, which contains a summary of the Business Engagement steps taken by Louisville, Kentucky. For more information, including research reports, case study examples, sample tools and templates for you to use, please visit the Business Engagement Toolkit website at www.corporatevoices.org/businessengagement.

www.corporatevoices.org/businessengagement

CASE STUDY

LOUISVILLE, KENTUCKY

Achieving Results through Private and Public Collaboration: Establishing a College-Going Culture and a Prepared Workforce

EVOLUTION OF PARTNERSHIPS IN LOUISVILLE

Louisville, also referred to as the “Possibility City³⁵,” is the largest city in the state of Kentucky and most widely recognized across the nation for hosting the Kentucky Derby. The leaders of Louisville have certainly lived up to the nickname by demonstrating that anything is possible through inviting and partnering with multiple stakeholders across the community to establish community-wide goals and a vision to help all families and youth succeed in college, work and life.

Historically in Louisville, like many communities, leaders did not often come together to proactively examine how to create a more educated and skilled workforce; more often than not they worked on individual causes in silos.

All that changed for Louisville when several major shifts occurred. First, in 2002, Louisville and Jefferson County merged to create a consolidated city-county government named the Louisville–Jefferson County Metro Government, creating the 16th-largest city in America.³⁶ This merger caused government leaders to partner across agencies to combine county and city entities; these partnerships caused other leaders in Louisville to step back and reexamine their relationships in the community. Second, in order to assess the opportunities and challenges with the newly created government, Louisville commissioned The Brookings Institution Center on Urban and Metropolitan Policy to draft a report.³⁷ The report highlighted Louisville’s strengths



and challenges, calling out its limited workforce in terms of size and skills. It also called on Louisville to become higher ranked among its peer cities in the United States in terms of educational attainment. This report, detailing the limited workforce and lower educational attainment outcomes in Louisville compared to peer cities, spurred a feeling of competition



among Louisville’s leaders to rise above these other communities—this drive of competition was a major factor in harnessing business leaders’ support and partnership. Third, the community in Louisville was ready “to marshal their best energies to reinvent their region as a truly great city.”³⁸

These major shifts helped both public and private leaders realize that they needed to raise their standing amongst their peer cities and that they wanted to work together to ensure Louisville was a place where all youth and families could succeed and where employers wanted to be. The future economic stability and well-being of Louisville’s youth and families depended on the ability of private and public leaders to partner to build broader partnerships across entities and set bigger goals for youth. The first large public and private partnership that developed out of these shifts was the Every 1 Reads campaign, in 2003, which was a community-wide effort to have every child in Jefferson County Public Schools reading at or above grade level. However, the leaders in Louisville were not satisfied with the early success of one cross-sector partnership—they wanted more.

In 2006, the Greater Louisville Project commissioned research to identify “Deep Drivers of Change” designed to move Louisville into the top tier among its peer cities in educational attainment and 21st-Century jobs.³⁹ This research produced an education pipeline analysis that became a baseline snapshot showing that only 25% of children entering kindergarten in Louisville will graduate with a postsecondary degree. In 2007, Greater Louisville, Inc. (GLI), the Louisville Chamber of Commerce, sponsored a trip to Dublin, Ireland, where business leaders were thoroughly impressed with the caliber of the educated workforce in the country compared to that in the United States. After they returned home, GLI convened a large group of business leaders to discuss how to build on the success of Every 1 Reads and decide how to help youth and families in Louisville achieve higher educational attainment and create a more skilled workforce. These business leaders were passionate, had an urgency to fix the problem and had data from the “Deep Drivers of Change” report to support their work.

Over the course of these years, business, government, education and civic sectors led the charge to help youth in Louisville succeed in school and earn a college degree. They partnered and developed several taskforces and initiatives focused on increasing student supports, leveraging multiple pathways to college, examining the high school structure, aligning the college workforce demands, raising college awareness in the community, and supporting legislative and policy changes. Some of their most well known initiatives include Metropolitan College, Youth Opportunities Unlimited, Close the Deal, Youth Print, the Ready by 21 Southeast Challenge, and the Business Leaders for Education.

In May of 2010, Louisville’s leaders set an inspirational goal of moving to the top tier of its peer cities by raising education attainment so that by 2020 at least 40% of working-age adults hold a bachelor’s degree and 10% hold an associates’ degree. Dubbed the Greater Louisville Education Commitment, Louisville will need to increase the number of college graduates by 55,000 over the course of the next ten years. It is a very ambitious goal and it will take an entire cadre of cross-sector leaders and stakeholders to make this happen. Leaders across all sectors in Louisville are taking mutual accountability to achieve this goal and to work together.

These business leaders were passionate, had an urgency to fix the problem, and had data points that backed up their work.

WHAT CAN YOU LEARN FROM THIS FOR YOUR COMMUNITY AND HOW TO ENGAGE BUSINESS?

Leaders in Louisville will say that public and private partnerships are not easy, there are challenges and turf battles, and it is a continuous improvement process. For Louisville, the hardest challenge was, and continues to be, defining outcomes for the work and detailing roles for all partners involved. Despite the challenges, all the leaders understand that the partnerships achieve the ultimate results of uplifting the lives of youth and families and, therefore, uplifting the quality of life in their community.

QUICK BUSINESS ENGAGEMENT TIPS TO LEARN FROM LOUISVILLE:

- ❑ **Use data as a persuasive tool to engage business leaders.** Louisville was able to bring business to the table by providing them with powerful data that illustrated how the poor educational outcomes were affecting their workforce and creating a sense of urgency around the issue.
- ❑ **Utilize the pull of the Mayor's Office, other prominent community leaders and peer business leaders to keep business at the table.** Louisville was able to identify peer champions to keep business leaders engaged.
- ❑ **Be transparent.** Louisville engaged both public and private leaders to develop goals and have open conversations about the challenges and barriers around their workforce and educational opportunities.
- ❑ **Find your passionate leaders.** Louisville is a place where there are passionate leaders who want to take chances, who understand the challenge and what is in it for their organization, and who want to be held accountable. These leaders both in the public and private sectors were ready to set broad visions and goals to create a more skilled workforce, a more educated community and a better place to live.



EVERY 1 READS

BACKGROUND

In 2002, Mike Harreld, the Regional President of PNC Bank, Kentucky, and Chairman of Greater Louisville, Inc. (GLI), the Louisville Chamber of Commerce, noted that it had been more than ten years since there was a push for education reform in Kentucky and that future efforts needed to include business community involvement because of their direct link to economic development. In 2002, Mr. Harreld created the GLI Education Committee and appointed Kevin Hable of Wyatt, Tarrant and Combs as the chair. Mr. Hable pulled together a wide range of people from the business community to discuss education in Kentucky and Greater Louisville, and to identify a potential issue which could benefit from support and leadership of the business community.



The GLI Education Committee met with state and local education officials, including then-Superintendent Dr. Stephen Daeschner, to discuss the challenges and issues in education. After many meetings and discussions, the GLI Education Committee published an education report in 2003 that outlined a series of recommendations, the main one focused on literary—that every child should be reading at grade level within four years. “The 2003 Report on Education,” outlined other issues impacting Louisville’s public education system and recognized the business community would have an obvious and strong interest in schools achieving and maintaining excellence.

The findings in the report were embraced by GLI, Jefferson County Public Schools (JCPS) and School Board, Jefferson County Teachers Association, Metro United Way, Louisville Urban League and Louisville Metro Government. The school system took the report and put together a plan of action for school improvement and the business community played a critical support and accountability role in the partnership.

The first community-wide effort was Every 1 Reads; the goal was to have every child in Jefferson County Public Schools (JCPS) reading at or above grade level within four years, by 2008. They would do this by:

- Recruiting 10,000 volunteers to assist with reading groups;
- Raising \$8 million over a four year period that would be matched by JCPS; and
- Engaging the entire community in this initiative.

The business leaders in Louisville were aggressively involved and recruited in Every 1 Reads. Here is how it unfolded:

IDENTIFY

The community of Louisville knew that ensuring that every child was reading at or above grade level within four years was an aggressive and ambitious goal. Business leaders and champions for the initiative were identified through the GLI Education Committee and other avenues. The business community played a supportive role and held the community accountable for this initiative. The business community provided resources and support by asking difficult questions to ensure that the initiative was on track. They were also asked to capitalize on established partnerships already in place with JCPS and to provide support, both monetarily and through volunteers, to bolster Every 1 Reads. The school system was asked to develop the educational programs and academic supports needed to achieve this goal.

The business community played a supportive role and held the community accountable for this initiative.

EDUCATE

Business leaders throughout Greater Louisville were educated about Every 1 Reads by their peers. Hable continued to lead the GLI Education Committee and ask ALL leaders in Louisville to stand and make a difference in the community through Every 1 Reads. He was able to recruit business leaders by motivating their bottom line. He argued that literacy is the cornerstone of all educational skills. His business case argument was that a better educated population created a more skilled workforce, and the companies in Louisville, like all employers, needed skilled workers. This message resonated with large, medium, and small business leaders across the community.

Sam Corbett, vice president of Sam Meyers, Inc., recruited business leaders to volunteer their time and the time of their employees to the initiative. Corbett visited businesses and spoke wherever he was invited to share information about Every 1 Reads and recruit volunteers. Corbett worked with GLI to help to ensure that employees received time off during the work day to volunteer. He also worked with the schools to ensure the volunteers were treated well.

Finally Chuck Denny, then head of Louisville operations of National City Bank (now PNC), chaired the fundraising effort from private donations from community members and the business community. One way they engaged and educated potential donors was through a breakfast meeting about Every 1 Reads.

PERSUADE

The Louisville community held meetings and multiple convenings of business leaders to present the business case for becoming involved, to recruit volunteers and to raise funds for the project. The business case argument and call to action was that a better educated and literate population created a more skilled workforce, and all companies are looking for skilled workers. The community also encouraged business leaders to donate time of their employees for volunteer hours and to contribute financially. They were transparent in what was expected of business and the role that those leaders and employees could play in the initiative. They recruited at a variety of local business organization meetings, including the local Rotary Club, and at individual companies. The business leaders of Louisville accepted responsibility and accountability for this initiative and lent it support.

One local business leader claimed, "The reason Every 1 Reads was successful is because progress was measured."

ACTIVATE

As stated, the goals of Every 1 Reads were aggressive but simple:

- Recruit 10,000 volunteers;
- Raise \$8 million over a four-year period that would be matched;
- Every student would be reading at grade level; and
- The entire community would be engaged in this initiative.



The business leaders of Louisville met the demand of the initiative. They lent their employees to volunteer in the schools and a variety of businesses, banks, law firms, insurance companies and hospitals all contributed to the fundraising efforts. For instance, PNC of Kentucky donated 80 employee volunteers. For business leaders, their employees were rewarded in many ways: "For me probably the

most rewarding [thing]... to see the self-satisfaction when [they] read a difficult word or achieved phonetic competence and the effect it had on their self-image and their ability to read," says Deborah Williams of PNC of Kentucky and an Every 1 Reads Volunteer.

In Louisville, business and education leaders historically operated in silos but through Every 1 Reads, business came into the classrooms and the schools opened up their classrooms to volunteers. This initiative sparked broader partnerships throughout the community across sectors.

OUTCOMES⁴¹

By engaging business and community leaders in Every 1 Reads, by 2008, 91% of students were reading at grade level. The number of below grade level readers was reduced from 17,667 to approximately 9,212—a reduction of 48%. Over the course of the four years, 11,000 volunteers were recruited and more than 3,500 are still active in the schools today. Further, as their part of the agreement, the school system agreed to implement major changes, for which funds were raised. They were:

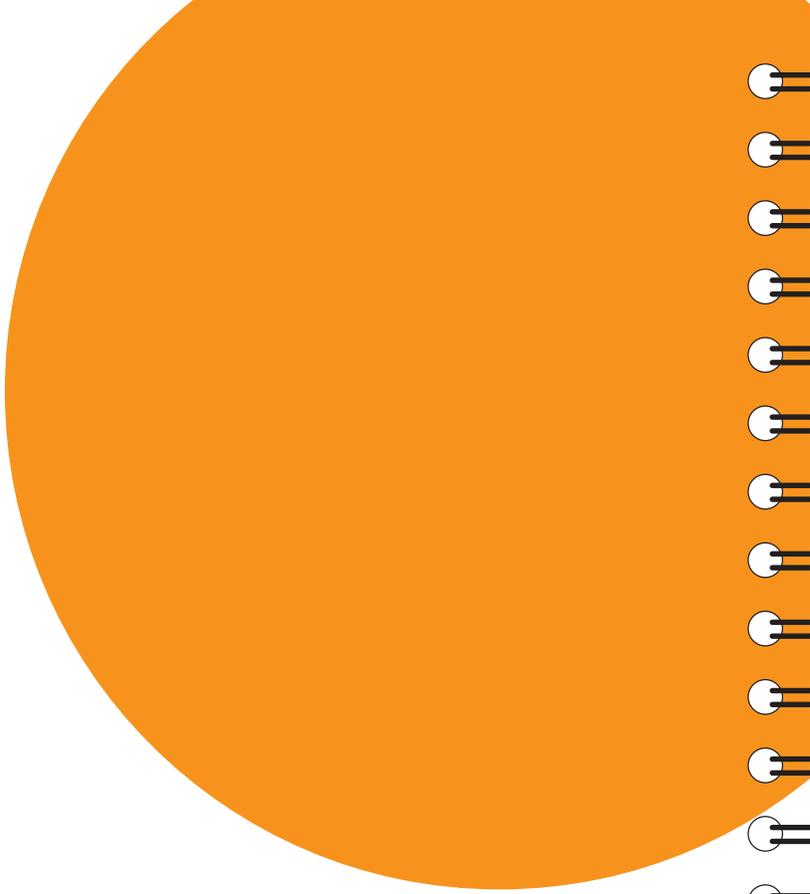
- Establish a new curriculum,
- Provide professional development to retrain teachers,
- Institutionalize regular assessments of students, and
- Develop plans for each youth based on the assessments.

According to Mayor Jerry Abramson, "This translates to 10,000 students who improved their reading scores and skills thanks to the diligence of our teachers, our kids, our parents and our volunteers." The initiative has grown and recently evolved into Every 1 Reads More.

"Community partners and volunteers were the key to the success of Every 1 Reads."

—Eileen Pickett, Senior Vice President,
Community and Economic Development,
Greater Louisville Inc., The Metro Chamber of Commerce

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All youth ready for college, work & life.



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