

Brian Joiner
3330 Tally Ho Lane
Madison, WI, 53705

31 May 2013

Mayor Paul Soglin
City of Madison Mayor's Office
210 Martin Luther King Jr. Blvd, Room 403
City-County Building
Madison, WI, 53703

Dear Mayor Soglin,

Strategic improvement of Madison's Non-Profit Sector

Thank you for the opportunity to present a proposal to assist you to continue to promote the effective development of Madison's non-profit sector.

Based on our understanding of your needs, as a result of our initial discussions to date, I am pleased to provide the enclosed brief proposal for the initial phase of this work, for your consideration.

We would welcome the opportunity to discuss this proposal further, and would be happy to provide any other information or clarification you might need.

Thank you again.

Warm wishes,

Brian Joiner, Senior Advisor

Kristen Joiner, Consultant

Jon Sandbrook, Consultant

Rebecca Ryan, Advisor

PROPOSED APPROACH

Madison has the existing infrastructure and the potential to lead the nation in innovation and collaborative civic engagement within the non-profit sector.

Madison has a strong culture of community development, an authentic sense of civic duty, a national profile as a progressive-thinking city, and a reputation for attracting more research funds than any other college town. Madison also has a non-profit sector with a strong contingent of innovative thinkers and bold community visionaries.

However, Madison's non-profit sector is currently struggling without a cohesive strategic vision for broad-based transformational social change. In response, individual service providers are necessarily focused on delivering discrete and largely disconnected activities and services, some of which inevitably run counter to others. This is inefficient and limits the potential effectiveness of the non-profit sector.

Now is the time for that strategic vision and leadership to emerge to harness the existing strengths of Madison's non-profit sector and elevate the city's position as a national model for social service innovation and civic engagement.

Based on interviews and research, combined with our own expertise in quality improvement and the non-profit sector on both a local and national stage, we will provide you with a report and a framework of recommendations for the strategic improvement of the non-profit sector in the city.

The process, which will be iterative and evolve as we learn from each interview and our own research, will include the following components:

1. Conducting a series of 12-15 one-hour interviews with various stakeholders in the Madison non-profit sector (specific list of stakeholders to be determined), including:
 - Local non-profit organizations.
 - Local government representatives.
 - Local community foundations/funders.
2. Conducting a select few interviews with strategic national funding organizations.
3. Collating existing data analysis and research regarding the effectiveness of Madison's non-profit sector.

Specific topics for discussion during these interviews may include the following (but not limited to):

- Understanding of the national non-profit funding environment and priorities and their relevance for Madison.
- Perception of the current state of Madison's non-profit sector capacity and capabilities and the current processes for development of this capacity and capability.
- The current process for evaluation of the impact of non-profits.
- Current constraints on performance of local non-profits.

- Sustainability of local non-profits.
- Overall potential and vision for Madison’s non-profit sector.

DELIVERABLES

The key deliverable will be a report and a framework of recommendations for the strategic improvement of the non-profit sector in the city, based on the interviews and research completed.

THE TEAM

The team completing this work will consist of:

Brian Joiner – Senior Advisor
Kristen Joiner – Consultant
Jon Sandbrook – Consultant
Rebecca Ryan – Advisor

INDICATIVE COST ESTIMATE & TIMELINE

The total cost associated with the proposed engagement, as outlined above is **\$5,000**.

The estimated timeline to complete the proposed engagement is approximately eight weeks, but this may vary depending on the availability of those individuals to be interviewed.





FUTURE WORK

The information gained in the initial work, as outlined above, will provide the groundwork for consideration of recommendations for next steps. Next steps may include developing further plans to:

1. **Seek national funds** – Attract new national grant dollars to Madison, put forth by foundations that want to fund innovative projects in social change.
2. **Re-align funding criteria & priorities** – Re-examine how it the City of Madison evaluates and rewards nonprofit organizations to ensure that programs that are doing the most good are supported.

3. **Create an innovation fund and incubator** – For research and development, catalytic funding, mentoring, support, professional development, and capacity building for innovation in non-profit organizations.
4. **Embrace regional, national and international best practices in philanthropy** – To encourage further investment in capacity building, ongoing professional and technical assistance, developing social impact models and grants, and more.
5. **Host a non-profit/philanthropy summit** – To expose local grant-makers to national best practices, and to expose national grant-makers to Madison's most innovative social change agents and projects.

CONTACT INFORMATION

| Primary Contacts | | |
|--------------------------------------------------|-------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
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| Kristen Joiner (Consultant) | 461 Orchard Drive Madison, WI 53711 |  (608) 520 3371  kristenjoiner@gmail.com |

ACCEPTANCE OF THIS PROPOSAL

Please confirm your acceptance of the proposal outlined above by signing below and returning a copy.

The Mayor's Office of City of Madison confirms and accepts the engagement to provide the services set out in this engagement letter dated 31 May 2013.

(Signature)

(Date)

(Name)

(Position)