Connecting with Potential Associations | Process

# Research

1. Consider who might be a good contact in terms of:
   1. **Sector & Perspective** – Does the association represent a sector or issue we do not already have on the table? Does the individual represent a perspective we need, in order to reflect the state at large?
   2. **Values** – Do you think the individual *and* the association share our values?
      1. Be bold
      2. Be aspirational
      3. Address root causes
      4. Work beyond quick fixes
      5. Identify common ground
      6. Get things done
      7. Respect one another
   3. **Approaches** – Do you think the individual *and* the association share our approaches?
      1. Recognize community assets
      2. Build relationships before we need them
      3. Engage individuals and groups even if (and especially because) we don’t agree with them, so long as all parties align with our values
      4. Transparency, honesty, and authenticity
   4. *NOTE: The answer to all of these questions may not be Yes! Just keep these in mind as you are moving forward.*
2. **Review / Collaborate**
   1. Go to our Associational Contacts list (on the Core Team page of our website) and find the contact
   2. If someone else’s name is there, get in touch with them. For example, if Jon’s name is listed, contact Jon – “Jon, I’m thinking of reaching out to Sally for a 1x1. Any thoughts or recommendations?” Set up a phone call with Jon if needed.
   3. If nobody else is listed as a contact, add your name with a note saying that you are going to reach out

# First 1x1

* **Goal:** Get a sense for this person and their organization.
* **How:** Focus on the personal. Let them know you are *not* trying to get anything from them. You are doing work to support thriving communities around the state through coalition work, and you think they are someone worth knowing. Share something personal about yourself. Tell a story that gets to your passion. Ask them about moments. Reflect back some characteristics you think you are picking up about them.
* **Some questions to ask:**
  1. What keeps you up at night? What fires you up?
  2. What do you love most about your work?
  3. Was there a moment in time when it clicked for you?
  4. What are your broader goals? What are you hoping to do in the next five to ten years?
  5. Who else should I talk to?
* **Tip:** Keep this conversation short. 30-40 minutes. It might feel rushed, which will make asking for a follow-up meeting seem like a natural fit.
* **Reflect:** Before moving on to the next step, pause and consider how the conversation went. It is NOT a waste of time to talk to someone and realize their values or approaches are not aligned with ours.

# Second (possibly third, fourth, fifth…) 1x1

* **Move to this step if:** You think there is potential.
* **Goal:** Deepen the relationship. Get a sense for whether or not they might be interested in the work of Wisconsin Partners – specifically, are they interested in multi-sector thinking? Building wide-ranging relationships? Working from the ground up?
* **How:** Bring up something they mentioned last time. Find out what their goals are, what keeps them up at night, what motivates them. Share more about what we are doing in Wisconsin Partners and why it is valuable to you. Continue to be clear that you are not trying to get anything from them. Depending on how the conversation is going, consider inviting them to connect with another person on the Core Team.
  + *For example, when Sam and I were going through the list of contacts, he mentioned wanting to meeting with the Planning Association. When I talked to Jason, he brought concepts similar to livable communities, so I asked him whether he knew about the work AARP was doing. He did, and said he had been meaning to reach out to them. It was easy for me to offer to do that for him. I followed up with Sam*
* **Reflect:** Before moving on to the next step, again take a moment to step back and evaluate the conversation. You may decide to have a third or fourth conversation before making any next steps! Relationships take time.

# Second Contact

* **Move to this step if:** You are fairly sure there is potential, and want to move this person forward.
* **Goal:** A second member of the Core Team builds a relationship with the potential new partner. They get a sense of this person’s values, approaches, and motivations.
* **Who:** Any other person on the Core Team, preferably another associational contact, though there might be times when it’s best to connect them with staff or regional partners. Consider the following:
  + Who does the potential association want to connect with?
  + If you are considering connecting them with someone on the Core Team who is already engaging in several relationship-building efforts, is there someone else you could contact instead?
* **Remember:** To add this to the Associational Contacts table on the website.
* **Consider:** Inviting the potential new association to a Wisconsin Partners event, so they can start to get a stronger sense of our work. For example, a Learning Exchange or Training Intensive. *Please only invite new folks to Core Team meetings after we’ve been through this process together!*

# Group Determination

* **Goal:** Core Team discusses whether or not to move forward with an invitation
* **How:** All Core Team members who have a relationship with this person will set up a phone call to discuss the invitation. If all of these members agree, you will send out an email to the whole Core Team (including people who don’t know this person) and let them know what you all have determined. Allow at least TWO full work days for everyone else to respond and raise any concerns.

# Invitation

* **Goal:** Invite this person to become a Core Team member of Wisconsin Partners
* **Some important things to discuss:**
  + What excites you about being a part of Wisconsin Partners
  + Why you are making the invitation – be transparent here! You think they are a good fit and see a lot of potential to do beautiful work together. You are excited about shared values and shared approaches. You really value their skills in [fill in the blank]. You think being part of this group will help them reach their goals. Maybe you admit that you just really appreciate their company and want an excuse to spend more time together.
  + This is not about money. All members contribute voluntarily because we believe in what we are doing. We operate with full transparency. Currently (September 2018), all associations are contributing $3,000 - $10,000 annually, with most between $3,000 and $6,000.
  + What we ask of Core Team members: participation at 6+ meetings annually, including statewide travel. Reaching out to other associations. Supporting the work of regional efforts. Being part of strategic process. You may want to show them your commitment sheet as an example of what to expect!
* **Documents that might be useful:**
  + Wisconsin Partners brochure
  + List of associations and regional groups, including recent success stories
  + Your commitment sheet, as an example

# Orientation / Onboarding

* **Goal:** New Core Team member is connected to the rest of the team. They feel a sense of ownership/stewardship within the organization. They have the skills they need to take the lead on different efforts.
* **How:**
  + New member is invited to a Core Team meeting at the end of the year, specifically designated for relational work
  + New member is matched with two “veteran” members, who will take the lead on providing support and connection for the first year
  + First year members of Wisconsin Partners have lower commitment levels as a way to ease into the organization more smoothly
  + New members have a goal of having a one-on-one with each Core Team member within the first year
  + New members will participate in a training on the broad-based relational model. If one is not already scheduled publicly, an internal staff training can be provided by staff and/or other Core Team members.