

## **Section III**

# **How to Recruit Partners**

## 3.1 Different Kinds of Business Partners

When you think about partnering with the business community, it helps to remember that you're not just targeting one kind of organization: There are different sizes and types of businesses, and they each have different motivations, resources, and approaches to working with schools.

### Large Businesses, Including National/International Firms

There are definite advantages to working with large companies: They can bring significant resources to your program, they bring a level of credibility to projects they get involved in, and they can influence stakeholders (civic leaders, other businesspeople) on your behalf. However, you may have to work through some bureaucratic channels to make the partnership happen: It may be difficult to find the right people to talk to, and they may have rules about how they work with schools (many large companies funnel their resources into "signature programs").

- ◇ **Headquarters** – If you're fortunate enough to have the headquarters of a large business in your community, or perhaps even in your state, you may have access to the best of both worlds: Ample resources with the discretion to pioneer new approaches. However, you may face challenges based on how the company is set up, for example, if the company's headquarters is just a small central office and most of the hands-on work (particularly work that might align with CTE programs) is handled elsewhere. In these cases, it may be best to look for support in the form of resources.
- ◇ **Regional or Satellite Office** – While still a powerfully ally, non-headquarters locations will probably have to follow guidelines set elsewhere, so be sure to find out what those guidelines are. In some businesses, remote sites have the freedom to experiment, with the best ideas "migrating up" to the central office, so you may still have opportunities for innovation.
- ◇ **US Office of an International Firm** – Foreign firms with a US presence may be particularly interesting prospects. Other countries handle education differently than we do; vocational training is a recognized

### Case in Point: Siemens

Germany is one of several European countries with a strong cultural commitment to vocational education: A large percentage of firms participate in workforce development initiatives at the secondary and postsecondary levels, offering students exposure to the workplace and preparing them through participation in the classroom and through internships and apprenticeships.

Siemens, an international advanced manufacturing firm headquartered in Germany, took the practices of its home

country and has begun applying them in the United States. Its Charlotte, North Carolina, location has joined a local consortium called Apprenticeship 2000 and began offering apprenticeships to students identified through the consortium in 2011. Students are full-time students at the local community college (Central Piedmont Community College, or CPCC), and by the time they have completed the apprenticeship program, they will have earned a degree in mechatronics engineering and also have a full-time position with Siemens.

career track, and businesses there are active participants in the preparation of young people with internships, apprenticeships, and other types of involvement. US branches of those firms may be more open to deeper and different levels of involvement in your program.

If you don't have an existing entry point into a large local headquarters, start by approaching someone in their community relations office; they can explore opportunities through internal channels and connect you with the right people.

### **Corporate Foundations**

Many large and mid-sized businesses have a corporate foundation; these may or may not be directly connected to the work that the company does. A bank's foundation, for example, may target issues like financial literacy, or they may deal with social issues not related to finance at all. You may find the foundation to be an independent organization, but in many cases, it is managed by the corporate citizenship office. Most only offer funding through grants, but some, particularly those run by the company itself, may also connect applicants to volunteers as part of the resources they provide.

If the foundation doesn't maintain its own website, either on its own or as part of the company's community relations section, you can get more information by looking them up on GuideStar ([www.GuideStar.org](http://www.GuideStar.org)) or at The Foundation Center ([www.foundationcenter.org](http://www.foundationcenter.org)).

### **Self-Assessment:**

*List one or two of your most important partners in each of the categories below and answer the following questions:*

*Large Business:* \_\_\_\_\_

*Small Business:* \_\_\_\_\_

*Business Coalition:* \_\_\_\_\_

- ◇ *How did you connect with them in the beginning? Were there differences among the categories?*
- ◇ *What do they contribute to your partnerships? Are some more likely to contribute funds, volunteers, expertise, or workplace experiences?*
- ◇ *Why do they partner with you? Are their motivations different as a group?*

### **Mid-Sized Businesses (100–500 employees)**

Mid-sized businesses tend to be local or regional enterprises, meaning that they have more resources than a small business but are still able to focus entirely on local efforts (unlike large national companies that may need to spread their

support around). They often have some flexibility, but you'll also likely need to work through a somewhat bureaucratic process; you'll probably be working with department heads and community representatives, and not with owners or executive managers. Mid-sized firms can be excellent partners because they usually have a large enough workforce to allow for numerous adult/student relationships, and the facilities needed to conduct workplace tours and host apprentices and interns.

### **Small Businesses (up to 100 employees)**

Small businesses are often your most flexible partners. You'll often end up working directly with the ultimate decision-maker — an owner who can make decisions and commit resources without needing approval from a committee. While they may not be able to provide the levels of resources and opportunities that the largest employers can offer, they can do quite a bit, and as a group they serve as the foundation of many programs across the country. They're also very accessible, either through business coalition contacts or through direct outreach.

### **Business Coalitions**

Business coalitions can be powerful partners, providing a single point of contact for dozens or even hundreds of businesses in your community. Workforce preparedness is usually one of their top priorities, and programs that can produce skilled and prepared employees are of great interest.

Note that there are different types of business groups:

- ◇ **Workforce Investment Boards, or WIBs** – WIBs focus on helping the unemployed and underemployed find good jobs. Some only serve adults, while others express an interest in the workers of the future.
- ◇ **Economic Development Corporations, or EDCs** – EDCs are most interested in attracting employers and other assets to their communities. The quality of their local workforce is a top selling point.
- ◇ **Industry Sector Groups** – These are local or regional organizations that work to advance the interests of a single industry sector, focusing on lobbying, sharing best practices, and advocating for a strong workforce.
- ◇ **Chambers of Commerce** – Chambers are networking and advocacy organizations that represent the multiple needs of businesses within a geographic area. Workforce preparedness is a primary concern.

The best strategy is to get involved in your local coalitions: join, attend meetings, and/or get involved in appropriate committees and events. On a program level, you can make contacts who can benefit your program by providing guest speakers, student and teacher learning opportunities, and more. And on a broader level, you can help these coalitions understand the challenges faced in education and work together to address them.

## 3.2 Where to Find Partners

One of the biggest challenges in partnership development is finding partners to work with. Most people feel uncomfortable making cold calls, and educators are no exception, so we put off that outreach work as long as we can. As a result, year after year, most schools fail to see the kinds of results that a vibrant base of partners can provide.

There's good news, however. Partnership development doesn't have to mean making cold calls all day: The key is to make "warm calls," which just means taking advantage of existing connections to build your new relationships. By focusing on warm calls, you and your future partners will already have something in common, like a mutual contact or a shared interest, which will serve as a jumping-off point for your discussion.

### **Developing a Target List**

Before you get out there, however, you need to develop a plan. Yes, you want partners — but which ones? Who are your best partnership prospects? Who's most likely to want to work with you, and have the resources to do so?

You can identify many of your best potential partners by doing a little research. There are organizations in your city, region, and state that can identify the largest and fastest-growing companies, often broken out by industry sector, providing you with an excellent starting point. The types of organizations may vary from one community to the next, but most often, you're looking for your chamber of commerce or an EDC.

The Economic Development Directory ([www.ecodevdirectory.com](http://www.ecodevdirectory.com)) is a good place to start; while this is not a comprehensive resource, it does offer a very good starting point, allowing you to search for all relevant organizations by state and then by region. You'll want to add to your search by reaching out to your local chamber and identifying any relevant industry sector organizations in your market. You may also find innovation hubs by talking with your postsecondary contacts.

Doing research through these channels will provide you with a strong initial list of the largest and fastest-growing companies in your area. But remember that it's only a starting point: There are any number of small businesses that may not show up on these lists but will make excellent partners. So as you start to reach out, let people know that you'd like inroads into the major companies you identified, but that you're also very interested in their suggestions as well.

### **Tapping Into Your Personal Network**

No matter how few business connections you currently have, your existing network of relationships can take you much farther than you might expect.

Consider the following opportunities:

### **Your Fellow Teachers and Administrators**

Every one of the teachers in your building, whether in CTE or not, has contacts in the business world who might be interested in the work you're doing. It may be a professional contact, like another CTE teacher's business partner, who may know people in your field; it may be another teacher's wife or brother-in-law. But the first place to start would be to talk with your fellow educators about your desire to connect with businesspeople, and ask them to work through their contact files to see what kinds of introductions they can make. It may make sense to bring all your CTE teachers together on a regular basis to share connections, and for targeted STEM programs, to also invite your science and math teachers.

### **Self-Assessment:**

*List three of your fellow educators who might be able to introduce you to possible business partners:*

Educator 1: \_\_\_\_\_

Educator 2: \_\_\_\_\_

Educator 3: \_\_\_\_\_

### **Vendors**

You and your administrators deal with many vendors to supply your programs with needed materials. If you're buying the same kinds of materials that businesses in your field are buying, then the odds are that your vendors are also selling to businesses in your industry and in your area. Tell your vendors what you're looking for and ask if they know of anyone they can introduce you to; this would give them a chance to help out two customers at once! As a bonus, you can ask them for insights into who the largest and fastest-growing businesses are in your area, giving you some very helpful market intelligence as you go forward.

### **Self-Assessment:**

*List three vendors who might be able to introduce you to possible business partners:*

Vendor 1: \_\_\_\_\_

Vendor 2: \_\_\_\_\_

Vendor 3: \_\_\_\_\_

### **Current Partners, Volunteers, and Guest Speakers**

Even if you don't have all of the partners you want, you probably have at least a handful of active and committed businesspeople who have already bought into your program. Whether these are CEOs or individual businesspeople serving as mentors or volunteers, they all understand firsthand what you're doing and can serve as excellent ambassadors when reaching out to their peers.

#### **Self-assessment:**

*List three of your current partners who might be able to introduce you to new business partners:*

Partner 1: \_\_\_\_\_

Partner 2: \_\_\_\_\_

Partner 3: \_\_\_\_\_

### **Advisory Board Members**

Advisory boards serve as a window for your program into the community, and a window for the community into your program. One of your advisory board members' core functions is therefore to let others know what you're doing and ask them to join the effort.

There are two factors here: First, whether you've recruited the right people to your board — specifically, that at least a few of them have professional networks that you can access — and second, whether you've actually asked them to help you make those connections. Assuming these are both true, your board should be serving as a powerful source of introductions into the business community. In addition to asking for help at one of your advisory board meetings, you might also consider making the partner recruiting function a formal role for your board, making it clear that it's one of the job responsibilities of board members, or even setting up a committee devoted to partnership development.

### **Parents**

Parents are an often-overlooked component of your network. But if you've had a chance to get to know them, you know that some may be well-connected in the community; in fact, some may even work at the companies on your target list! And of course they have a powerful motivation to see your program succeed.

#### **Self-Assessment:**

*List three parents who might be able to introduce you to possible business partners:*

Parent 1: \_\_\_\_\_

Parent 2: \_\_\_\_\_

Parent 3: \_\_\_\_\_

### **Postsecondary Partners**

Many secondary-level CTE programs have active relationships with educators at their local community colleges, whether formal (such as articulation agreements or dual credit arrangements) or informal. These educators have their own networks of businesses within your shared industry sector and will likely see the value in helping their partners connect with students at the secondary level. As noted in Section VI (Advisory Boards), it may even be helpful to explore the idea of shared advisory boards between secondary and postsecondary programs.

### **Self-Assessment:**

*List three of your current partners who might be able to introduce you to new business partners:*

Partner 1: \_\_\_\_\_

Partner 2: \_\_\_\_\_

Partner 3: \_\_\_\_\_

### **Former Students**

Have you kept in touch with any students after they've graduated? You'll likely find that at least some of them have pursued a career in your field, possibly even working at some of your target companies. And who would be in a better position to represent the value of your program to a prospective partner, than a valued employee who you introduced to the industry? If you don't currently have relationships with former students, start working now to stay in touch with current students as they graduate; it will be rewarding for you both.

### **Self-Assessment:**

*List three of your former students who might be able to introduce you to new business partners:*

Student 1: \_\_\_\_\_

Student 2: \_\_\_\_\_

Student 3: \_\_\_\_\_

### **Personal Interests**

You have a life outside of school, whether it's involvement in your church, a



civic group, charitable work, an athletic league, or all of the above. Each of these activities puts you in touch with people you would not have otherwise met, and who have personal and professional networks of their own. As you talk casually with others in your groups, you may find some new inroads into your target list or learn about other companies that might be a good fit for your program — there’s no harm at all in asking for a little help in making that connection.

## Self-assessment:

*List three of your personal connections who might be able to introduce you to new business partners:*

Connection 1: \_\_\_\_\_

Connection 2: \_\_\_\_\_

Connection 3: \_\_\_\_\_

## Detroit’s Education Engagement Project

It’s no secret that the city of Detroit is facing significant challenges. However, those who believe that education in Detroit is a lost cause would be wrong: There are still many islands of success to be found, and the schools that are doing the hard work of effectively educating their students are benefiting from community support through programs such as the Education Engagement Project (EEP).

Like many other business groups, the Detroit Regional Chamber of Commerce had worked for years to support local education efforts. According to Greg Handel, senior director of workforce development, “What we’ve found is that if we approach a school that’s not performing well, thinking that we can fix that from the outside by providing resources, the results have been disappointing. We’ve learned that if a school is not academically achieving, there are often deeper issues than resources. But what we can do is look for schools that are moving in the right direction and work with them. This was a big change in thinking for us.”

The Detroit Chamber saw this as an area in which it could provide value and in 2006 launched EEP. EEP helps to establish business/education partnerships for schools that have been moving in a positive direction. They do this by encouraging chamber members to work with selected schools, and training schools on how to work with business partners.

EEP began by conducting school tours for members of the business community. Through these tours, business leaders had an opportunity to sit down and talk with parents, students, and school leaders to learn about the school from the perspective of multiple stakeholders.

An important step in this process, according to Chamber liaison Brooke Franklin, involves preparing principals

for these site visits. “We took the time to go sit down with these principals and help them understand how to tell their stories,” said Franklin. “They need to be able to articulate how they got from where they were to where they are today. It wasn’t about putting up a front: You can see through that in a second. It was about presenting their actual work and accomplishments, showcasing what they’re already doing to create change.”

The tours had a powerful impact: Many business leaders would actually double back to talk further with the schools without even being asked by the chamber about next steps. This enthusiasm came in part from the fact that businesspeople were so impressed by the leadership and practices that they found in place at selected schools, and they were excited to have a chance to help advance the efforts of people who were already doing a lot of things right.

As business and school leaders began working together, EEP saw a variety of partnerships being put into place. It was important to EEP that the education and business partners decided themselves on the scope and type of the partnership so the partners could find the right fit for them.

While EEP continues to conduct tours, they’re finding that current business partners are now bringing others to the table through word of mouth. The chamber also promotes partnership opportunities through their website, publications, and meetings.

Going forward, EEP plans on expanding the level of support they provide to business and education leaders. No matter what they do, however, it will be based on the premise that good partnerships will only take place when building on a solid foundation.

## Taking Advantage of Networking Organizations

Up to this point, we've looked at maximizing your own personal and professional networks to make industry contacts. But there are also organizations that exist in large part to help you make these kinds of connections, and educators who get involved in these groups can see significant benefits.

You've already looked to your chamber of commerce, economic development organizations, and other groups as a source of information in learning about the industry landscape. But information is just one of the values that these groups offer; another lies in connecting their members to one another.

Go back and look at that list of connector organizations again. Do they accept memberships? Do they have committees that would be relevant to you, such as an industry-specific committee, or one focused on education or workforce issues? Do they have general gatherings or special events that you can attend?

Some tips for getting the most out of these organizations:

- ◇ It's not enough to pay your membership dues: You've got to be active in the organization, attending meetings and serving on committees. If you don't get involved, you'll get very little benefit.
- ◇ Be a constructive member of the organization. Members may have had bad experiences with the education system, or have an unfounded bias against it. Rather than act as an apologist, acknowledge their concerns and redirect the conversation in a more positive direction, looking at what can be done to address issues going forward rather than defending things you likely had no connection with.
- ◇ Ask one of the organization's staff members for help. Let them know that you're there to learn what issues the business community is facing, but also that you're interested in finding new partners to support your work. If the organization is interested in workforce issues, they'll likely be very interested in helping you.
- ◇ Ask if you can host a general meeting, or at least a committee meeting, at your school. Be prepared to give attendees a tour of your programs, highlighting your successes and the value your program provides to local workforce preparedness efforts.

## 3.3 What to Look for in a Partner

Educators appreciate all those who are willing to contribute to the success of their students. But there are certain characteristics that point to a high-value partner: An organization or an individual who has the potential to make a significant contribution to your work, and with whom you can build a long-term relationship. And there are ways you can purposefully look for the kinds of people best qualified to fuel your work.

### **Ideal Qualities of a Business Partner**

While all of your partners will have at least some of these, it's the partners who carry most or all with them that you really want to pursue.

#### **A Focus on the Students**

First and foremost, every partner has to have a sincere interest in providing students with opportunities that engage them, expand their horizons, and help them develop into adults (as workers and as people). It's fine for partners to also have personal motives (see below), but this focus on the students is a must.

#### **A Clear Benefit for Themselves**

Partners must also have a clear sense of what's in it for them. If they don't perceive a real benefit from being involved with your school, their initial enthusiasm may fade in favor of more rewarding opportunities. Of course, if they don't come in with a clear sense of their return on investment (ROI), you can help them identify their ROI using the information in Section 1.

#### **Time**

Partnering with schools requires that businesses commit some amount of time to the effort. This may be extensive (as in volunteering programs) or not, but at a minimum your partners need to take the time to gain firsthand knowledge about the work you're doing. Be aware that some people may have a tendency to overcommit.

#### **Resources**

Resources don't have to be financial in nature: They can involve the time of mentors or volunteers, they may include the expertise that your partners bring to your advisory board or student competitions, or they may be reflected in your partners' advocacy efforts. But for a partnership to exist, each party — including your business partner — must bring something of value to the relationship.

#### **A Collaborative Approach**

Interpersonal skills, like having a positive attitude and considering other peoples' points of view, are extremely important in developing a long-lasting relationship. The assets a partner brings to a project can be alluring, but at the end of the day, this is someone you're going to spend time with on a regular basis.

## **Reliability**

There are few things worse than inviting students to an exciting special event, only to have your partner show up unprepared — or worse, to not show up at all! If you're going to trust businesses to work with your staff and students, they must be dependable, able to fulfill any commitments they make.

## **Understanding**

Education and business can be very different environments; education often requires more consensus-building and may involve specific approval processes, for example. Partnerships go much more smoothly when your business partners understand and accommodate those differences.

## **Finding Partners that Meet Your Needs**

As Stephen R. Covey said in his *Seven Habits of Highly Effective People*, "Begin with the End in Mind." As you begin the task of recruiting business partners, think about any particular needs facing your programs or your students. Do you need people who are good at fundraising? How about people who can provide or find paid internships for your students? Do you need someone with excellent leadership skills to be your advisory board chair? What about someone who has excellent presentation skills or communications skills? Identifying the needs of your students, yourself, and your program is the first exercise in successful business partner recruiting.

Use the chart below to help identify your needs:

		<b>Attributes, Skills, Talents Required by a Partner</b>	<b>Prospective Candidates</b>	<b>Contact Information</b>
	<b>A. Program Needs</b>			
1	Funding	Tenacious, large number of contacts, has fundraising background or experience	Sylvia Jones – ABC Bank Foundation	sjones@abc.com 555-555-5555
2				
3				
4				
	<b>B. Student Needs</b>			
1				
2				
3				
4				
	<b>C. Other Needs</b>			
1				
2				
3				
4				

## 3.4 How to Connect to Prospective Partners

As noted in Section 3.2, you have much more access to prospective partners than you might think: By leveraging your personal or professional networks, you should have access to a long list of businesses in your field. But it's one thing to know you have access to them — how do you actually introduce yourself and guide them in to a partnership?

There are four critical components of your work to guide prospective partners into your program. These include:

- ◇ The introduction
- ◇ Learning about them
- ◇ Educating them
- ◇ Getting on the same team

We'll explore each of these in turn.

### The Introduction

Once you have identified who you're going to contact, you need to proactively reach out to prospective partners. If you found out about your prospect through someone in your network, the best thing you can do is leverage that relationship as much as possible in making the introduction. Ideally, your contact will reach out to the business, introduce your program, and ask if they would be willing to have a phone call or meeting with you. Even better would be to have them join the call or meeting! This kind of introduction, facilitated by someone who they know and trust, is by far the best approach.

Since your contact identified the connection in the first place, he or she will likely have an idea of what they want to say to their associate. But if they would like some guidance, let them know that they might focus on the prospect's interest, and suggest you as a solution. For example:

*"Hi Bob, this is John Smith. Listen, I know your company hires a fair number of welders, and that you've had trouble finding good people. I know the head of the welding program at [School Name], and I know that they're interested in building their program. I was wondering if I could ask him to give you a call to talk?"*

With this kind of introduction, your contact has given the business a powerful reason to want to talk to you; a first meeting is very likely at this point.

In some cases, your contact may not be able to personally make contact on your behalf, but permit you to use their name. (Always ask permission before using

someone's name of course.) While a direct introduction is still ideal, being able to refer to a mutual contact is a close second.

If you have no personal connection to the business, it's still entirely possible to reach out on your own: Remember that, even though your prospect doesn't realize it yet, you have powerful shared interests, and you could both benefit greatly by working together. You're not asking for charity, and you're not selling anything: You're exploring a professional relationship of shared benefit.

When you make the introductory outreach yourself, with or without being able to reference a shared connection, there are a few ways you can go:

### **Letter**

Many schools send out letters each year to hundreds of businesses, inviting them to join the school as a partner. These are usually form letters, and almost always fail to get a response. Letters — even personalized letters — require a fair amount of effort to respond to, unlike e-mail or a phone call. We do not recommend sending letters if you're interested in getting a response.

### **E-mail**

E-mail can be a very effective tool. The key is to understand what it's good for

## **E-mail Introduction - Sample**

### **I. With Referral**

SUBJECT: Referred by John Smith re: welding training

Dear x,

I run the welding program at [School Name]. As I was talking to John Smith the other day, he mentioned that you might be interested in the work we're doing to prepare students for the field. I'd appreciate a chance to talk with you; we rely strongly on industry feedback and I'd like to learn what you're looking for in welders.

Would you be interested in connecting by phone? When would be a convenient time for you to talk this week?

Sincerely,

### **II. Without Referral**

SUBJECT: Guidance on welding instruction needed for [School Name]

Dear x,

I run the welding program at [School Name]. I was hoping for a chance to meet with you at some point: I understand that your company hires welders on occasion, and I'd like to learn what you're looking for in your new employees. We prepare students for this field, and we rely strongly on industry feedback to tailor our instruction.

Would you be interested in connecting by phone? When would be a convenient time for you to talk this week?

Sincerely,

and what it's not. Specifically, e-mail is very good at reaching someone with a short and targeted message in order to elicit a specific action — in this case, to very quickly let someone know that they may have an interest in what you're doing, and then asking to talk by phone or in person. See the e-mail messages on the previous page as an example.

E-mail cannot carry the weight of the entire partnership development process. Don't send a five-page e-mail with every detail on your program, and don't send 10 attachments with brochures or newsletters either. The vast majority of people won't read this much content. Instead, use e-mail as a way to knock on someone's door, and move the conversation to another forum as soon as possible.

If you send two or three e-mails and don't receive a response, don't give up: Some people may be more comfortable with other channels of communication. Look instead to the phone or a personal introduction as a way to connect.

### **Phone Call**

If you're more comfortable on the phone than online, phone calls can also be an effective way of making first contact with a new partner. As with e-mails, make your phone call short and to the point: Immediately establish why this is of interest to them ("I understand you hire welders from time to time"); explain the purpose of your call ("I run the welding program at [School Name], and we look for industry input to tailor our efforts"); and present the desired action ("I was wondering if I could come by to see your operation sometime?"). Some people may want to talk more at that moment, and that's fine; but you should open with a focus on your desired next step in case they're busy.

### **Meeting at Industry Event**

An unexpected face-to-face meeting (or expected, if you were angling for an introduction) is a bit of a different scenario. It's a more conversational setting: You'll have more time to talk about your work and establish that element of shared interest. But it does help to be prepared for these situations to make sure you get across your main points. For example, in these kinds of chance meetings, you might look for opportunities to mention:

- ◇ The number of students who go through your program each year; ideally, the number of students who enter the field
- ◇ Outside affirmation of your work — the fact that students earn industry credentials or get credits at a local college
- ◇ The fact that you're using current technology to prepare students for what they'll find in the workplace
- ◇ Members of your advisory board, or any current business partners, they might know
- ◇ Any students you know who are now working with your prospective partner's company

Industry meetings give you an opportunity to be much more conversational; just remember to turn the conversation back to your prospective partner, asking about their job, their company, and their background. If the conversation goes well, you'll find it very easy to ask for a follow-up meeting to talk further.

### **The First Meeting**

If your introductory call or e-mail was successful, you've secured an opportunity to talk further with your future partner. If at all possible, try to meet with them in person rather than talking over the phone: A face-to-face meeting is much better for building relationships than a phone call.

Two considerations when setting up your first meeting:

- ◇ At this first meeting, make an effort to have one of your advocates at the table, such as the person who made the initial referral, someone from your advisory board, or one of your business partners. You want one of their professional peers there to explain firsthand why they're committed to your program. But if you can't secure that person for the initial meeting, you should still plan on meeting with your prospective partner as soon as you can (ideally within a week or two of the initial contact).
- ◇ Where should you meet? Before you enter a partnership, you'll want your business contact to visit your school. But for your first meeting, you should try to meet at their place of work. Since you initiated the relationship, you should make the time commitment to travel to their business; besides, it conveys the message that you want to learn more about what they do. And to that end, be sure to ask for a tour of their facility so you can see what they do firsthand — you'll get a chance to scope out their operation to identify possible work-based learning opportunities, and you may be introduced to others at the company.

At this first meeting, you'll want to focus on three objectives:

#### **Learning about them**

One of the most important things you can do at this meeting is ask questions and be sincerely interested in the answers. Your prospective partner will begin to understand that you care about their problems and challenges, which will go a long way towards establishing a shared approach. This kind of fact-finding will also provide the information you need to start scoping out the kind of partnership model that will make sense for you both.

#### **Educating them**

When you talk about your program, speak in terms that will be of interest to them, like how you're trying to prepare students for the realities of the workplace, and how you're emphasizing workplace skills as well as technical skills. Bring written materials on your program that they can take with them, and emphasize the impact of your work on students by bringing photos of students in action and talking about their accomplishments and future plans.



Talk in positive terms about all that you're achieving; don't emphasize the negative, or fixate on your needs and shortcomings. Remember that people want to be associated with a success not pulled into a rescue operation.

### **Getting on the same team**

Emphasize your shared interests; try to establish a relationship where you're both on the same side, dealing with a common problem. Use "we" and "us" more than "you" or "me."

If all goes well, you will have each learned about the other's operations and found common ground for talking further about how you can work together. You may have even started to brainstorm specific partnership ideas. But to fully engage your prospective partner and give them the information they need to inform the planning process, it usually makes sense to bring them to your school so they can see your program for themselves.

If they're not interested in visiting your program right now, look for some other action step to keep the door open and gain some value from the connection. You might ask if there's someone else at the company you could talk to about specific, low-commitment opportunities ("We try to take students out on site visits — who could I talk to about setting that up?"). You might ask them to serve as an expert in some way ("Each year we survey employers on needed skill sets — can we include you in that survey?"). Or you might just look for a commitment to talk again when the timing might be better ("I understand this merger is preventing you from getting involved in anything right now. Can we touch base in six months to see where things stand?").

### **The Second Meeting**

If your prospective partner is interested in visiting your program, try to make sure the meeting happens during the school day: You want them to have a chance to meet your students and see your teachers in action. Better yet, try to schedule the visit for a day when some of your business partners are on campus, which will reinforce the idea that businesses are active in your program.

As you tour the building, remember to highlight the successes and the positive aspects of your program: Don't focus on the shortcomings, the needs, or the resource challenges. And keep your focus on the students — too many educators (especially administrators) default to talking about the facilities.

Once you've talked and visited one another's sites, you'll likely have some idea as to how you can work together. They may fit in with one of your existing partnership models, perhaps taking a place on your advisory board, joining as a mentor or volunteer, or participating in some other existing initiative. If you and your partner are interested in developing a new program, the models outlined in Section 2 will provide some good guidance as to how to do that; once you have the parameters outlined, all that remains is to define the specifics and secure a commitment. The next two units will cover those steps.

## 3.5 Making the Pitch

As your relationship with your prospective partner has developed, you've had a chance to explore your respective needs and goals and the kinds of resources you can each bring to the table.

At some point you'll feel ready to go from general exploratory discussions to putting a concrete proposal on the table — a plan that defines specifically what the partnership looks like, what each of the stakeholders gets out of it, who's responsible for each piece, and how you'll know that it's working.

There's no single right way to do this. You and your partner may have sketched this out over time, as your relationship has progressed, or they may have been hesitant to suggest anything, expecting you to take the lead.

Whatever the case, when it's time to put a proposal on the table, you'll want to make sure it includes the following elements:

- ◇ **Partnership Description** – In concrete terms, you'll want to lay out what the partnership looks like: If it's a career mentoring program, for example, you'll want to define how many times per month students meet with their mentors and for how long, how many students and adults will participate, who will oversee the program, and what the career areas are that they will explore.
- ◇ **Stakeholder Roles** – You should identify each of the stakeholders, including students, your partner, your school, and anyone else with a role to play (administrators, parents, etc.) and figure out what that role is.
- ◇ **Targeted Outcomes** – Knowing who will be involved in the program, you should set clearly defined outcomes for each stakeholder, so you can make it clear what they'll get in return for their participation.
- ◇ **Measurement** – For each of the key stakeholder outcomes, you should decide how you'll measure impact. These could be qualitative measures like increased student understanding of certain careers, or they could be quantitative, like boosting graduation rates among participating students by 10 percent.
- ◇ **Partner Responsibilities** – You should be very explicit in listing out the responsibilities of each partner. Who will recruit the mentors, and who will recruit the students? Who's responsible for the background checks on the mentors? Who will host the meetings? Who sets up site visits and handles transportation? Who will manage the measurement function?

Sometimes this can be handled through a simple conversation, particularly when you've already discussed some of the details in general terms. It might be sufficient to work through the elements face to face, doing no more than jotting

down the details in a notepad so you have a written record of the conversation. Other times, particularly for larger partnership proposals or for partners who need to get approval from other parties, you'll want to prepare a more formal proposal outlining the partnership idea you discussed.

### **Writing Winning Partnership Proposals**

In partnership development, sometimes a strong proposal can make all the difference in getting your prospective partner to commit. Proposals are certainly not required in every situation: smaller-scale initiatives rarely justify them, and they are not always needed when talking with a sole decision-maker. But in cases where you're requesting a large commitment, or when many people are involved in the decision to partner with you, a well-written proposal is an indispensable tool in securing an agreement.

It is important to note that writing and submitting a proposal should be the last step, not the first, in the partnership development process. A proposal should only be developed after developing a relationship and talking at length about what you each want to accomplish (for the partners and for the students), how you want to measure those accomplishments, and what each party is able to bring to the table.

This information is critical in creating a customized partnership plan that provides a return to your partners as they define it, and it allows you to frame your proposed partnership in terms that your partner will see as relevant to his or her business or organization.

### **Elements of a Successful Proposal**

The exact structure of your proposals will vary based on your audience and what you're trying to do. But the elements below should be addressed in some way:

#### **Goals/Benefits**

At an early point in the proposal — preferably on the first page — clearly lay out the benefits of the partnership in terms of both student/school outcomes and partner outcomes. Sample text:

*“By working together, [partner] and [school] have an opportunity to increase interest in science, and therefore impact career awareness and selection, among [targeted student population]. By working with [school] on this initiative and promoting its successes, [partner] will not only be able to present itself as a socially committed company among its customers and stakeholders, but will also realize specific benefits including increased employee morale and an improved labor pool as these students enter the workforce.”*

Remember that the benefits highlighted here must be identified on the basis of your partner's interests and backed up by specifics later in the proposal. Don't promise higher morale, for example, if there's no way to develop and measure it.

### **Key Project Participants**

It's helpful to list the key players in the partnership so that your new partner knows who is involved, what their role is, and whether they've already committed to the project. Be sure to include your school or district on the list and identify their contribution (such as a commitment of staff time, facilities, or access to data).

### **Analysis of Current Situation**

This section combines a description of where things currently stand with a statement of need — in other words, why the current state is unsatisfactory. As an example, you could explain that graduation rates for your targeted student population are 20 percent below those of other groups, and outline the implications of that in terms of poverty rates and a shortage in the local workforce. This will set up the need for your proposed solution.

### **Proposed Solution**

This is the “meat” of the proposal: a description of how your program will help students get from point A to point B. You should be sure to highlight the evidence backing up your proposed solution: You don't need to write a dissertation by any means, but your partners must feel confident that your solution is backed by evidence and has a reasonable chance of success.

### **Measurement/Evaluation**

If someone is going to invest their time, talents, and treasure in your partnership initiative, they need to have a reasonable expectation that their investment is going to produce results. Once you've laid out your solution, you must explain how you'll measure success according to your objectives. This could be by tracking test scores, but it could also involve pre-/post-assessments of interest, graduation rates, or the percentage of students exploring postsecondary opportunities. Include interim measures (to guide the development of the program) as well as final outcome measures. The key is to find measurements that are tied to your objectives and that your partners find to be relevant.

Remember also to measure the returns desired by your partner, whether those relate to career awareness, workforce preparation, employee morale, community goodwill, or some other goal. These measures, and responsibility for tracking them, may come from your partner — but they should be referenced so it's clear that they are being included in the plan.

### **What Your Partner Will Provide**

The point of a proposal is to secure a commitment from your prospective partner; you must therefore spell out exactly what you're asking of them. Be as specific as possible: Instead of asking for volunteers, ask for five volunteers to be present at the school from 3 to 4:30pm on Mondays and Thursdays in October. And ask them to participate in a review or advisory board as well; they will want ongoing input into your work.

### **What Your Partner Will Receive**

In the beginning of the proposal, you offered general information on the benefits your partner will receive; you should provide specifics on those benefits in the body of the document. This includes describing how those benefits will be defined and measured, in terms relevant to your partner. For example, you may say that “by allowing employees to participate as mentors, [partner] can expect to see an improvement in employee morale. [Partner] can track this through its annual employee survey or by having employees participate in a pre-/post-survey.”

### **Signature Lines**

A proposal is a request for a commitment; get yours in writing by asking an authorized representative of your partner to sign the agreement. Have the proper person within your organization sign it as well. A signed proposal is a valuable resource because it can help clear up any confusion over either party’s role and can help keep the terms of the relationship in place in the event of a leadership change.

### **About Your Organization**

It will be helpful to provide information about your school, district, or nonprofit organization as an appendix to your proposal. Remember that some of the people reading the proposal may not have been involved in discussions. In addition to sharing basic facts, you might present yourself as an attractive partner by highlighting areas of strength and recent accomplishments; you can also significantly strengthen your case by outlining other past or current partnership successes.

The key with any successful proposal is to speak from the point of view of your prospective partner. If you can explain in ways that are personally meaningful to them what they will get in exchange for their participation (i.e., their ROI), your proposals will be well received and it will be much more likely that those prospective partners will join with you as a powerful ally in your work to improve student outcomes.

### **Once You’ve Made the Pitch**

Your proposal, whether verbal or written, isn’t a “take it or leave it” deal. Your partner may want to make some changes (which is a good sign, since it means they’re likely on board with some tweaks). They’ll probably have some questions as well — these questions may be easy to answer or may expose some holes in your plan. Again, this is a good sign, as it means your pitch is being taken seriously.

All of the work you’ve done should result in a “sale.” But in order to “seal the deal,” you sometimes have to ask the question directly:

- ◇ “Are you ready to join our advisory board?”
- ◇ “So, can I count on you for this career mentoring program?”

- ◇ “Can we agree that you’ll make a contribution of \$\_\_\_\_\_?”
- ◇ “When can you give a firm commitment to this project?”

All of these questions are “closing questions” that can be answered with a “Yes” or “No.” If the answer is “Yes,” then you’ve accomplished your goal. If the answer is “No” or “Not yet,” then the prospect still has some questions in his/her mind. You might then say,

- ◇ “What other information can I share with you to help your decision?”
- ◇ “Is there something I haven’t fully explained?”
- ◇ “Is there a reason or concern you have that I haven’t fully addressed?”

Hopefully, open-ended questions like these will uncover something that you can address and allow you to then try a “closing question” again.

Famed salesperson Zig Ziglar said that “People don’t change their minds. But sometimes they make new decisions based on new information.” If you get a “no,” try to ascertain the real reason — time availability, personality conflict with someone else on the project, or perhaps a lack of support from the individual’s manager. If any of these issues change, your prospective partner could make a “yes” decision sometime in the future.

Assuming your partner is ready to move ahead, there’s just one more step: Sealing the deal, or setting up a formal agreement and putting some things in place to maximize your chances for success!

## 3.6 Sealing the Deal

Congratulations! Your prospective partner is now an actual partner: They've agreed to the partnership you proposed and are ready to start working. There are just a few things you need to do in order to get things off on the right foot:

- ◇ **Get commitments in writing.** Spell out each party's responsibilities and get each party to sign off. (See the sample below.)
- ◇ **Start to build other relationships in the organization.** One reason that partnerships fail is turnover: When one of the program leaders leaves their organization, it's easy for the project to die for lack of any other internal support. Find that support before it's needed.
- ◇ **Get some early "wins."** Set some early goals and meet them to give the project some momentum. They can be small — but early successes will build trust between the partners and a positive feeling about the work.
- ◇ **Spread the good word!** Let people inside each of your organizations know about the new partnership. This is the first step to building internal support and finding participants once you get started.

### Partnership Agreement - Sample

This document outlines the responsibilities of [School Name] and [Business Name] as they establish a partnership to help students explore career opportunities and workplace realities in the welding profession.

For the 2014–2015 school year, [School Name] agrees to the following:

- Recruit no more than 20 students for the program
- Secure parent signatures on permission slips
- Administer background checks on adult volunteers
- Provide transportation up to once per month to [Business Name] for site visits
- Administer pre- and post-surveys to students over the course of the program to gauge the impact on their career plans and knowledge of the field

For the 2014–2015 school year, [Business Name] agrees to the following:

- Recruit 20 employees to mentor participating students
- Allow those employees to spend up to two hours per month with students "on the clock" and agree that employees will not be penalized for any lost production during that time
- Train students on safety procedures before allowing them into the work area; provide safety equipment as needed
- Make a donation of \$500 for classroom materials related to this program
- Administer pre- and post-surveys to participating employees over the course of the program to get feedback on the program and gauge any change in employee motivation or morale

With their signatures below, both parties the responsibilities listed above.

[School Name Signature]

[Business Name Signature]

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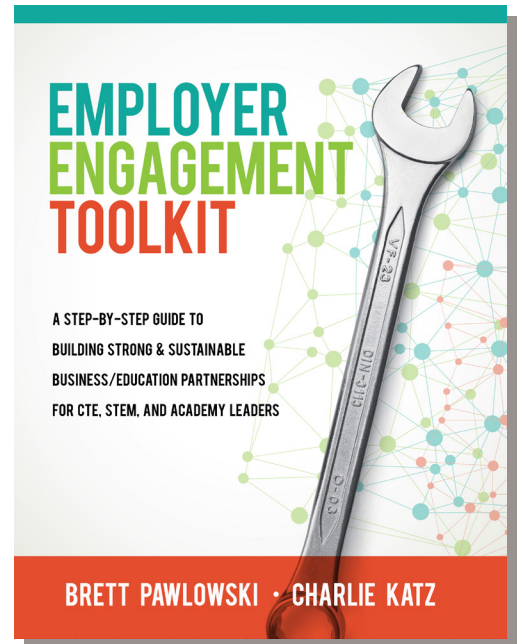
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- **How to Recruit Partners** – How to find the partners you need, how to connect with them, and how to engage them in your program
- **Measuring Partnership Outcomes** – Design an effective measurement/evaluation model to track outcomes for your partnerships
- **Engaging Partners for the Long Haul** – Your best partners are those who come back year after year; find out how to boost long-term involvement
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