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Companion Toolkit
Working With Community Partners

CREA
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ESTATE ASSOCIATION

Trust-Based Philanthropy Principles

We always want to keep a posture of "doing with" our community partners, not "doing for" or "doing to". As you enter more detailed conversations with potential non-profit partners, be sure to keep the principles of Trust-Based Philanthropy[1] in mind to ensure you're centering the needs of the community.

Do your homework

‣ Research potential partners in advance. Read about the organization's mission, focus areas, beneficiaries, and programs before your first in-depth project meeting.

‣ Ideal partners demonstrate accountability to and collaboration with the communities they serve. Ask questions about *how* partners work together with communities so you can better understand how you and your team can do the same.

‣ Push yourself further outside of your comfort zone. Some vocabulary and stories you hear from community partners may feel unfamiliar to you. Don't let this deter you. Get comfortable with being a bit uncomfortable. Ask questions and listen to understand.

Be responsive, not prescriptive

‣ Listen for needs, challenges, or opportunities that you might be able to respond to. We don't want to come into any conversation with a non-profit with the assumption that we have a solution. They are the experts, and they know what they need and what they're able to offer in terms of experience for your volunteer team.

‣ Focus on your non-profit partner's needs and goals. Let your partner lead the way and truly work to meet their needs and goals. Commit to being truly community centric.

Define the commitment

‣ Clear communication and shared understanding are critical. Decide how often you'll connect, the best ways to communicate, and any collaborative tools you might use.

‣ Under-promise and over-deliver. Don't over-commit. If you want to see a project through to the end, be realistic with your partner about what you can and cannot do, and the amount of time, skills and budget your team can offer.

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1   **Trust-based philanthropy project**

Communicate with curiosity and openness

▸ Understand why the organization exists and what it hopes to solve. Remember: communication and collaboration are a pathway to success, and you can build strong relationships through trust, humility, and empathy

Think about sustainability

▸ Ask yourself, "Will the task be completed at the end of the volunteering project? If not, is it easy for another volunteer team to pick up where you leave off?"

Scoping Script

This is a comprehensive scoping guide. Pick and choose the most relevant questions to ask your community partner once you're ready to dig into your project planning details in full.

Part 1: The Project: Immediate Volunteer Needs

PRIMARY POINT OF CONTACT:

Are you the primary point of contact for this volunteering activity?
If not, who would that be (name, email)?

What's the best way to communicate with you/this person regarding this project?

Are there any scheduling preferences I should be aware of?

ACTIVITY OVERVIEW:

Could you provide some additional details on what this volunteering activity will entail?

Is this activity in-person or virtual/asynchronous?

Is this an activity you've done with volunteers in the past?

What participation do you need from us for the event planning process?

Does your team manage the day-of-event logistics?

ACTIVITY DETAILS:

How many people can participate in this activity?

Is this a one-off event or ongoing?

What day(s) is this activity available?

Are there specific start/end times? (Include time zone if needed)

Are there any on-site safety considerations to keep in mind?

Is any food/water provided on-site? If not, is it OK for us to provide this?

Are there any budget requirements to participate in this activity?

If asynchronous or virtual, is there an opportunity to gather participants before/after the activity online for a brief and/or debrief with your team?

VOLUNTEER REQUIREMENTS:

What skills will volunteers need to have to participate?

▶ If in-person, ask the basics like lifting a certain amount of weight, standing on their feet for a specific period, etc.

What materials will volunteers need to participate? (Even something as small as a pen)

▶ Be sure to ask about clothing requirements (e.g., closed-toed shoes, long sleeves) and, if outdoors, any weather-related suggestions (e.g., sunscreen, hat)

Is the volunteer site accessible to those with mobility challenges (ramps instead of stairs, etc.)?

CAUTIONS AND CONCERNS:

What concerns do you have about completing this activity? (Share anything that jumps out to you as a pinch point).

Part 2: The Impact (Why it Matters)

TASK SIGNIFICANCE:

How would you relay the meaning of this activity to a volunteer?

How does this impact your beneficiaries?

What does it mean to them?

What's something unique about this activity volunteers might not consider or realize?

PROXIMITY TO BENEFICIARY AND STORIES OF IMPACT:

Could you share a story of an individual your organization works with who has been touched by your mission?

How do you typically collect stories of impact from your beneficiaries/community?

Is there anything we can do to help with the collection of stories?

How can we help you amplify these stories of impact?

MEASURING IMPACT:

How does this volunteer activity help you meet your organization's objectives?

SOCIAL SHARING:

Does your organization have any preferences about volunteers (or your board/association) sharing this activity on social media?

Will your organization share our board/association (or individual volunteers') involvement on social media? (ADD ANY SPECIFIC SOCIAL MEDIA REQUESTS YOU HAVE HERE)

FINAL CHECK-IN/MISSING DETAILS:

Is there anything else I should know or be sure to share with volunteers about your organization or this activity?

Do you have any questions for me?

Part 3: Conclusion

This has been incredibly helpful. Would you mind if I reach out with any follow-up questions?

[Thank the interviewee for their time and explain your next steps.]

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