

Memorandum of Understanding

[insert date]

[Name]

[Title]

[Organization]

[Address]

[Address]

Dear [ED/CEO],

San Diego Social Venture Partners (SVP) is pleased to offer [organization name] a pro bono consulting engagement. We form a unique alliance with our nonprofit partners to support your goals for strengthening your organizational capacity. Increasing your ability to achieve your mission is our ultimate goal. We deliver this support in a unique way. We recruit, train and support our Partners to volunteer their professional expertise. They donate their time and talent to our nonprofit engagements and invest in SVP.

To begin our journey, this Memorandum of Understanding outlines the key elements of our partnership to support mutual understanding between SVP and your leadership, including your board of directors.

SVP Approach

- **Partner volunteer and investors:** We offer our Partners the opportunity to translate their professional skills to community impact. They bring decades of business and other professional experience, passion, and a learning mindset to support our work. Using a collaborative approach, our Partners come alongside nonprofit clients to help them overcome organizational challenges and rise to opportunities. SVP Partners value the experience of using their professional skills for social impact, the relationships they develop and what they learn about our community and your important work.
- **Values-driven culture:** We are anchored in the SVP values of Community, Trust, Excellence, Continuous Learning and Professional Accountability. Learn more about our values at www.sdsvp.org/values.

Nonprofit Engagements

- **Team approach:** We assemble teams of our Partners to work with nonprofits throughout the engagement. Initial SVP teams comprise three Partners who join with staff and/or board members from your organization. We bring in additional Partners as needed for specific projects or support. SVP staff is responsible for team placement and formation.
- **Lead Partner:** Every team has a Lead Partner who is the point of contact for your organization's primary leader (e.g., executive director or chief executive officer).



- **Scope of Support:** Our first step was to collaboratively establish a Scope of Support (See Appendix) that describes the support areas on which the team will focus, the format and timing of meetings and projects, anticipated outcomes, and the project duration (typically about six months). Changes to scope and/or duration should be reflected in a revised or amended Scope of Support.
- **Feedback and impact statement:** We conclude our engagements by compiling an Impact Statement. We will also ask for your feedback in a survey.-Your honest responses support our learning and ability to help other nonprofits.
- **Subsequent engagements:** We often work with nonprofits on more than one engagement. You are welcome to reapply for additional support after your team concludes.
- **SVP Community:** We maintain contact with many of the nonprofit organizations that we have worked with over the years. We love to hear ongoing updates and stories of success from our work together and hope you will stay in touch long past our engagement period.

Expectations

Nonprofit:

- Your ED/CEO will serve as the primary point of contact and coordinate with your Lead Partner throughout the engagement.
- You agree to work with the SVP team in the cadence described in your Scope of Support or discuss adjustments to the scope with your Lead Partner.
- You agree to provide basic financial reports and documents relevant to our work together in a timely manner.
- You are welcome to contact SVP staff at any time to discuss your engagement or raise any questions or concerns. Our goal is to maintain a strong relationship with your organization while supporting a successful engagement.
- You will support our efforts to measure and understand impact by responding to our feedback survey sent to you following the engagement in a timely manner.

SVP:

- Our Lead Partner will coordinate with your ED/CEO throughout your engagement.
- We will provide you with the best consulting, advice, mentoring and capacity-building that we can.
- Our Partners will approach engagements as advisors with a learning mindset and practice of empathy.
- We will seek your honest feedback to support the continual improvement of our teams and our organization. We will maintain confidentiality.



- SVP staff support our teams and may occasionally participate in nonprofit meetings. They may also check in with you directly on the status of the engagement, provide general resources of interest to your nonprofit, and connect you with the larger SVP community.

Termination

- Either party may terminate the agreement-before the end of the engagement.

As a first step in our working relationship, we ask that you review, sign and return this letter and the attached waiver and release form, providing that the terms are acceptable to your organization. We look forward to a meaningful, positive, and impactful relationship with [organization name].

Signature / Date
Erica Halpern
Chief Executive Officer
San Diego Social Venture Partners

Signature / Date
[Name]
[Title]
[Organization]



Waiver and Release

I hereby authorize San Diego Social Venture Partners (SVP) to list the name of our organization and our logo on their website (www.sdsvp.org), electronic newsletters, emails, social media, or other publications to indicate that we received SVP's volunteer support without payment or any other consideration. A generic statement of the type of volunteer support, duration and parties involved may also be included. Any further communication, marketing, or outreach materials related to the nature, outcome, or details of the activity in which we mutually engage is allowable with prior approval from me or other executive level leadership.

As a material condition to San Diego Social Venture Partners (SVP) entering into a volunteer engagement with your organization, your organization hereby waives, releases, holds harmless and forever discharges SVP and each of its employees, officers, directors, members, partners, affiliates, agents, attorneys, successors, and assigns, of and from any and all claims, demands, debts, contracts, expenses, causes of action, lawsuits, damages, and liabilities, of every kind and nature, whether known or unknown, in law or equity, that your organization has or may have, arising from or in any way related to your relationship with SVP; provided that this waiver of liability does not apply to any acts of gross negligence or intentional misconduct.

Signature / Date

Jess Baron

Executive Director

Guitars in the Classroom

Appendix: Scope of Support