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Building on Success

Program Orientation

October 10, 2019



Congratulations!

- Welcome to the Building on Success Program!
- You are in for a busy and exciting two years
- Today:
 - getting to know each other
 - forming expectations



Agenda

- Welcome and Introductions
- Program Structure and Expectations
- Working Together
- Nonprofit Life Cycle
- **Dinner & Meet Your Consultant**
- Capacity Building/Organizational Assessment
- Working with Consultants
- Closure / Next Steps



Program Requirements (or, how did we get here?)

- ✓ 501(c)3, nonprofit organization or fiscally sponsored
- ✓ Services benefit Hartford Foundation's 29-town area
- ✓ Board meets regularly/provides financial oversight
- ✓ Board diversity – must meet Hartford Foundation Governance Diversity Policy requirements by the beginning of the second year
- ✓ Annual operating budget below \$200,000
- ✓ Active financial history that spans at least one full reporting year



Program Requirements, continued...

- ✓ Three-person leadership team (Board Chair & E.D. required)
- ✓ Grant funding contingent upon **full program participation**
 - completion of an organizational assessment
 - minimum of 1-2 team members participate in every session
 - meet at least quarterly with assigned consultant
- ✓ Participate in the Building On Success program evaluation



Program Goals

This program will help you to:

- Understand current capabilities and areas for future development
- Plan to strengthen areas of greatest need
- Learn and apply information about important nonprofit management functions
- Develop a strategic plan
- Fund mission related requirements



Program Highlights:

- Three-person leadership team
- Consultant support:
 - Initial and final organizational assessment
 - Capacity development planning
 - Individualized follow-up support
- Eight cohort learning sessions and one introductory session
- Mission support grants of \$5,000 each year (total of \$10,000)
contingent on full program participation
- Program evaluation



Program Schedule

2019	October 10	Program Orientation
	Oct – Nov	Initial Organizational Assessment
	November 21	Session 1 (Financial Management)
2020	*March 26	Session 2 (Strategic Planning)
	*April 30	Session 3 (Strategic Planning)
	September 17	Session 4 (Board Governance)
	November 19	Session 5 (Building an Inclusive Board)
2021	March 18	Session 6 (Fund Development)
	June 17	Session 7 (Engaging Your Community)
	Aug – Sept	Final Organizational Assessment
	September 23	Session 8 (Program Evaluation)

***Full-Day Sessions**



Program Resources

- Program binders and session materials
- Strategic planning materials
- Web link for electronic materials

<https://www.hfpgnonprofitsupportprogram.org/what-we-offer/workshops/building-on-success>



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Grant Payments

- Two grant installments of \$5,000 each
 - Early 2020
 - Early 2021
- Automatic payment pending full participation



Questions ?

Working Together

Janna Pedersen

Brief Introductions

- Name
- Position/Role
- Organization

What Brought You Here?

- Discuss for a minute or two in your organizational group
- Choose a spokesperson (one person will speak per group)
- We'll debrief in the large group



Norms

About how we will work together (for example):

- Begin and end on time
- Attend every meeting

Other ?

Outcomes

Tangible results your organization hopes to achieve (for example):

- Draft a strategic plan

Other ?

Nonprofit Lifecycles

Roosevelt Smith



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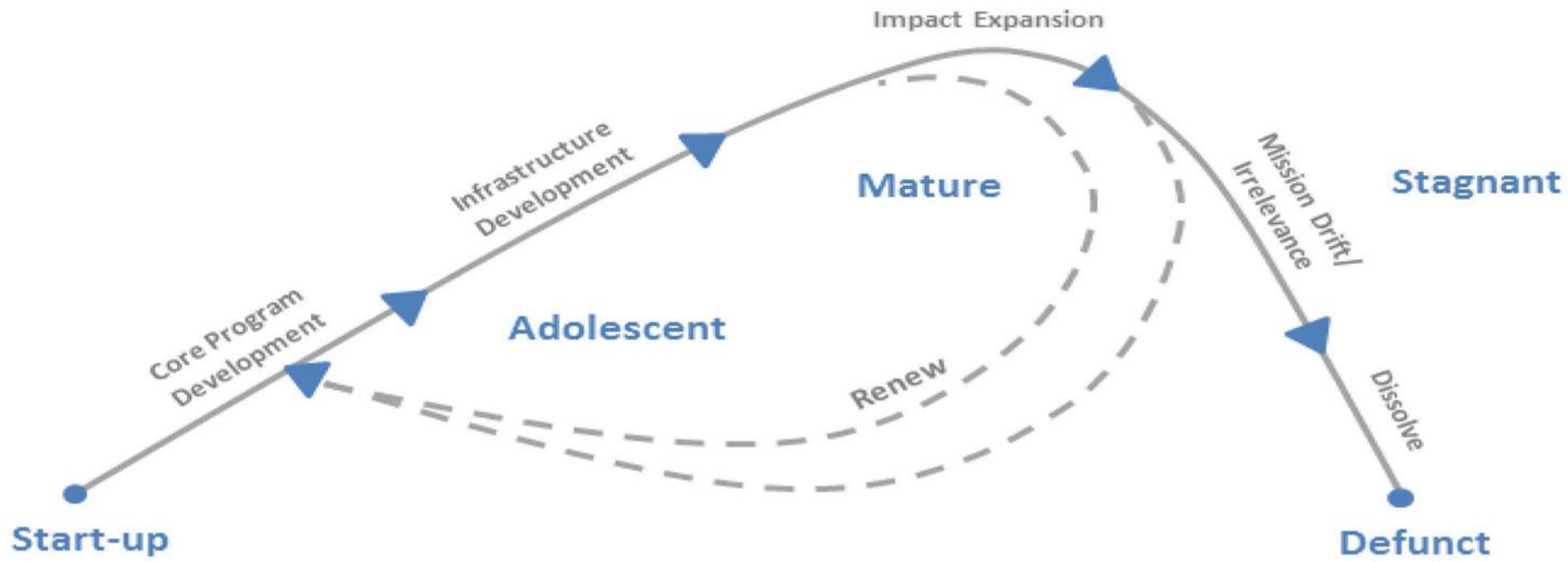
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Lifecycle Framework: An Overview

- Organizations are not static, they change. Like people, organizations typically go through different phases – Lifecycle.
- Lifecycle framework is a great tool for initiating, anticipating, managing and understanding change/capacity building.
- It helps define “typical” characteristics and predictive challenges/opportunities organizations face at each lifecycle stage of development.
- The lifecycle framework is not necessarily sequential or evolutionary.
- The lifecycle framework is not age or size dependent.



Organizational Lifecycle: How Nonprofits Evolve



Lifecycle Framework Group Discussion

- In your groups scan the Speakman model (handout). Then discuss and answer the following questions:
 - ✓ At what overall lifecycle stage is your organization?
 - ✓ Given where you are what feels like your biggest challenges and/or opportunities?
- Time permitting – a few share backs and/or questions in the larger group.



Dinner and Meet Your Consultant



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Consultant Assignments

Organization	Consultant
BSL Educational Foundation, Inc.	Roosevelt Smith
Connecticut Center for Nonviolence, Inc.	Janna Pedersen
Connecticut Immigrant and Refugee Coalition, Inc.	Janna Pedersen
Foundation for Educational Opportunities, Inc.	Roosevelt Smith
Glastonbury MLK Community Initiative	Shari Pinsky Adams
Lift Every Voice and Sing Gospel Festival Fair	Cathy Cohen
Nourish My Soul, Inc.	Janna Pedersen
Open Doors Outdoors	Shari Pinsky Adams
Pro Bus National, Inc. Greater Hartford Club	Roosevelt Smith
SPEDConnecticut, Inc.	Cathy Cohen
Wood Memorial Library and Museum	Shari Pinsky Adams

Capacity Building in Nonprofit Organizations

Cathy Cohen



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What is Capacity?

- **Performance** - a measure of effectiveness, an indication of how well the organization manages the tasks related to its overall mission or stated goals.
- **Resilience** – the ability to navigate change, to lead and sustain an organization facing a new reality or a dynamic environment.
- *Capacity may relate to an individual, a nonprofit organization, a hospital, a school, a community, or the whole nonprofit sector.*



What Strengthens and Builds Capacity?

- Financial Management
- Fund Development Strategy
- Communications
- Human Resources
- Clear, Strategic Thinking
- Diversity and Inclusion
- Leadership Development
- Board Development
- Succession Planning



But How does an Organization Become More Effective?

It achieves and sustains high performance levels

- By choosing desired outcomes or goals
- Adapting strategies/crafting new ones to realize goals
- Identifying champions to guide the effort
- Seeking the most needed resources (time, energy, money) to invest in the process



How will we know if we Succeed?

Our desired outcomes may be:

- Functional Board committees
- A strategic plan
- A more inclusive Board
- Organizational efficiency improvements
- Greater impact on community
- More clients served
- Expanded funding opportunities



We Begin a Two-Year Journey

By the end of our work together, expect:

- Increased organizational self-awareness
- New external connections and resources
- A clear strategic direction
- Informed Board members who understand their roles and responsibilities
- Leadership that communicates well and guides Board and staff in a plan for growth and stabilization



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Organizational Assessments

Shari Pinsky Adams

What is an Organizational Capacity Assessment?

- A process for obtaining information to reflect on and assess organizational capacity and performance.
- It enables an organization to:
 - ✓ Identify strengths and challenges
 - ✓ Build on strengths
 - ✓ Determine areas for improvement



Anticipated Outcomes of the Organizational Assessment

- Self-reflection and organizational learning
- Shared understanding among board and staff of your organization's current health and capacity
- Identification of areas for improvement and organizational priorities
- Benchmark for organizational development



The BOS Organizational Assessment Process

- Organization/Consultant Meetings (Oct. – Dec.)
- Consultant will facilitate a discussion with your Board and staff to identify strengths and opportunities for improvement in the following areas:
 - ✓ Mission, Planning, & Evaluation
 - ✓ Governance
 - ✓ Board & Staff Leadership
 - ✓ Funding & Financial Health
 - ✓ Infrastructure & External Relations
- The facilitated discussion will help shape your organization's capacity building priorities and guide the work with your consultant over the next two years



Organizational Assessment: Next Steps

1. Set up a meeting with your consultant
2. Complete your organization's assessment by December



Working with Consultants

Janna Pedersen



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Working with Consultants

- How many have worked with consultants previously?
(show of hands)
- Any learnings from working with consultants?

A Few Guidelines

- Understand expectations: what a consultant can and can't do during the BOS program
- Respect each others' time
- Keep agreements or, when you or your consultant can't, make a new agreement
- Be candid with your consultant
- Value your own organization's wisdom as well as the consultant's expertise
- Any questions?



Closure / Next Steps

- Please complete your feedback form and leave on table
- Work with your consultant to complete your Organizational Assessment
- Next Session:

Tuesday, November 14 – Financial Management

- Check the web link for session materials!





Thank You !