Best Practices for Capacity Building

Prepared by
The Florida Housing Coalition
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Questions

[Enter a question for staff]
Webinar Logistics

• As we advance through this Webinar- please note at least 2 items that you value from each section—something that you may not have thought about before- or something you will try to implement in a more effective manner going forward— Takeaways

• We will take 60 seconds at the conclusion of each of the five sections for you to type in 2 takeaways

• You can also type in Questions and those will be answered at the conclusion of the Webinar
Presenters
(in order of presentation)

• **Jaimie Ross**, President/CEO, *Florida Housing Coalition*

• **Christina Mitchell**, Director of Volunteers & Events, *Metropolitan Ministries*

• **Marilyn Drayton**, Senior Vice President, *Wells Fargo*

• **Susan Pourciau**, Director of Homeless Training & Technical Assistance, *Florida Housing Coalition*
Strategic Business Planning &
Building an Effective Board

Jaimie Ross

President/CEO,
Florida Housing Coalition
Build Capacity  ➔ Fulfill Mission

• Strengthen and equip to achieve mission – and thrive.

• Ongoing process
5 Areas of Focus

• Strategic Business Planning;
• Building an Effective Board;
• Engaging Community Volunteers;
• Public and Private Sector Fundraising;
• Funding Case Management and Operations.
Strategic Business Planning
A nonprofit organization is a business

- That is a deceptively simple statement.
- But if you don’t operate as a business you will soon be out of business
- What does that mean?
Difference Between a For-Profit and a Non-Profit

- Profits earned by a non-profit are invested in the work of the nonprofit—the profits do not inure to the benefit of the owners (the board).
- A for-profit business uses its profits to maximize financial return to its owners—its investors or its shareholders.
- The mission of the nonprofit organization is its reason for being.
- The tasks it undertakes are the strategies it uses to achieve that mission.
Why Should a Non-Profit Have a Business Plan?

• Nothing will lead a nonprofit faster to extinction that failing to have a business plan
• Why such a bold statement?
• Because the very fact that a nonprofit is in business to do good is what leads people both inside and outside the organization down the path of helping others without remuneration to the organization.
• “I thought you were a nonprofit... What do you mean you want to be paid!?”
Strategic Business Plan Takeaways from Participants

• Takeaway 1
• Takeaway 2
Strategic Business Plan Takeaways

• A nonprofit organization is a business.
• Business expectation is to fulfill mission.
Building An Effective Board
Building an Effective Board

• For purposes of this Webinar- we are addressing the board of a single organization.

• As distinguished from Building an Effective CoC board. Continuum of Care Board Governance is a topic that we will cover in future workshops, webinars, and on-site training.
Building an Effective Board

- No two nonprofits will have identical strategic plans but all must address organizational capacity - and that includes building an effective board.
Building an Effective Board

• A nonprofit has no shareholders for whom to generate profit—but it does have a board of directors.

• The board of directors sets the policies for the organization—in general, it does not carry out the day to day functions of the organization.
Building an Effective Board

• Is your board helping you to meet your mission?
• Nonprofit work is hard…. Overworked and underpaid should not be the reality of a nonprofit… but often is.
• An effective board should ensure that you and your staff are not overworked and underpaid.
Building an Effective Board

- By “owning” the organization
- Do your board members say “we” or “you”?
- How to Turn “you” into “us”
- **ENGAGEMENT** - as in committing to be an integral member of the organization
Top 5 Ideas for Board Engagement

1. Use the strategic planning/business planning process.
2. Identify and use the expertise and advise of the board.
3. Ask the board members to open doors to resources and connections for you.
4. Ask the board to help you raise funds.
5. Take good care of your board- your board members have a fiduciary duty to the organization- they deserve full and timely information- well-structured meetings- jobs to do-- and gratitude and recognition for a job well-done.
Board Development Depends....

- Founding Board
- Mature Board
- Working Board
- Fundraising Board
- How Big Should Your Board Be?
- Term Limits? Election from the membership?
- Conflicts?
Building an Effective Board Takeaways from Participants

- Takeaway 1
- Takeaway 2
Building An Effective Board
Takeaways

• The board must take ownership of the organization’s mission.
• Take good care of your board!
Engaging Community Volunteers

Christina Mitchell

Director of Volunteers & Events, Metropolitan Ministries
Engaging Community Volunteers

1. Identify Volunteer Opportunities
2. Recruit the Right People
3. Provide Ongoing Training
4. Give Consistent Appreciation

If you have 10 or 10,000 volunteers, the principles are the same!
Why Should We Engage Volunteers?

• Volunteers Give More!
• More Exposure for Your Organization!
• Many Hands Make Light Work!
• Clients Succeed!
Creative Brainstorming

• Consider all the services that you pay for an outside vendor to do.

• What are the tasks or projects that your staff can’t find the time to do?

• Are there day-to-day tasks that a volunteer could do, for a staff person, to give them more time?

• Do you have a list of “nice-to-have” projects?
Engaging a Wide Audience

• How can you engage children in service at your organization? Groups? Mandated Hours?
• Are there opportunities for clients to volunteer?
• Can you create “one-time” opportunities?

EXAMPLE: Holiday Tent Volunteering
Plan it Out!

• Consult similar agencies in your area for best practices
• Prioritize volunteer opportunities
• Decide who should lead each volunteer opportunity
• Craft a short description for each opportunity
  – Include items needed to bring, physical ability required & dress code.
• Don’t forget to include incentives for volunteering! Meals, Job Training, Special Event Tickets, etc.
Engaging Community Volunteers

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*If you have 10 or 10,000 volunteers, the principles are the same!*
Collaborative Partnerships

• Who in your community could you partner with to accomplish your goals?

EXAMPLE: Brewster Technical School Partnership
Group Volunteerism

• **Corporate/Business’ Social Responsibility**
  – Consider your current donor base

• **Civic Groups**
  – Research groups whose interests are aligned with your mission

• **Schools – Elementary/Middle/High**
  – Class Food Drive
  – Bright Futures Hours

• **Universities – Center for Civic Engagement**

• **Religious Groups**
Individual Volunteerism

- Host a “bring a friend day” for your current volunteers
- Seniors/Boomers
  - Seniors in Service, AARP
- Mandated Hours
  - School, Court, Housing Programs, etc.
- Board Members

EXAMPLE: Red Apron Program
Online Recruitment

• Create a webpage dedicated to volunteer opportunities
• Use FREE resources
  – Meet the Need, Sign-Up Genius, Volunteer Match, United Way, Community Newspaper Sites, Event Listings, Idealist, etc.
  – Social Media Sites **Consistently** – Facebook, Twitter, Instagram, etc.

*Setting up your online presence is a PERFECT teen volunteer project!*
Connect Passion with Service!

• Look for organizations and people who are passionate about your mission!
• Recognize that volunteers are clients too!
Engaging Community Volunteers

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*If you have 10 or 10,000 volunteers, the principles are the same!*
Orientation

• Give potential volunteers a “Disney” first impression!
• Provide a brief history of your organization
• Share the Mission & Vision for the future
• Offer specific ways you have helped the community
• Tell them how to sign-up to volunteer
• Take them on a tour of your organization

Have a volunteer lead your Orientations & Tours . . . Just like Stan the Man!
On the Job Training

• Shadowing staff or other volunteers
• Share policies and best practices
• Evaluate volunteer performance & create a culture where “feedback is a gift”
• Include volunteers in staff trainings

EXAMPLE: Non-Profit Leadership Center of Tampa Bay

Don’t have policies or procedures? Need training materials created? Volunteer Opportunity!
Engaging Community Volunteers

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If you have 10 or 10,000 volunteers, the principles are the same!
Appreciation = Retention

• Steward your volunteer’s gift of time, just as you would a donor’s gift of money.

• Task the most creative person at your organization with free/inexpensive volunteer appreciation ideas

According to independentsector.org a volunteer’s time is worth $23.07 per hour!
FREE (or inexpensive!)

Appreciation Ideas

• Volunteer of the Month
• Highlight a Volunteer on your website/social media
• Give a coveted parking spot to a volunteer
• Hand-written notes from your clients
• Presidential Service Award (less than $10)
• Lunch with the President of your organization
• Tickets to a special event with your organization
• Ask a local restaurant/business to sponsor a volunteer event or give gift certificates
Engaging Community Volunteers
Takeaways from Participants

• Takeaway 1
• Takeaway 2
Engaging Community Volunteers Takeaways

1. Be creative when identifying your volunteer opportunities and engage as many different types of volunteers as possible. Is there any opportunity for everyone in your community to volunteer at your organization?

2. Encourage everyone at your organization to find collaborative partners. How can you work together with other organizations to best serve your community?
Public and Private Sector Fundraising

Marilyn Drayton
Senior Vice President,
Wells Fargo
Today’s Agenda

• The State of Nonprofit Funding
• Preparing Your Organization
• Sourcing Funds
• CRA Benefits to Banks
State of Nonprofit Funding

• Value in fostering the *relationship* before the “Ask”
• Expectancy of greater *transparency*
• Increased focus on *efficiency* and *effectiveness* (E2)
• Greater *engagement* and giving by the “*Boomers*”
• Shift to a culture of “*investing*” vs. doing good
Preparing Your Organization

• **Board Training** on fundraising is critical
• **Board Investment**: serves as 1st line of givers
• Having a **Strategic Plan** as Your Compass
• Articulate track record, impact and what’s unique about **YOU**!
• Prepare to **Tell Your Story**; elevator speech

“**By failing to prepare, you are preparing to fail**”
- Benjamin Franklin
Sources of Funding

- **Grants**
  - Foundations (Private/Public)
  - Banks and Corporations
  - Government Sources
  - Individual Donors

- **Loans**
  - Lines of Credit
  - Bridge Loans
  - Business Credit Card

- **Investments:**
  - Equity Equivalent (EQ2)
  - Program Related Investments (PRI)
CRA Benefit to Banks

*Large* banks - three comprehensive CRA tests:

- Loans
- Investments
- Services
Funding Takeaways from Participants

• Start by building relationships.
• Be able to articulate your mission in an elevator speech.
• There is funding for capacity building!
Funding Case Management and Operations

Susan Pourciau

Director of Homeless Training & Technical Assistance, Florida Housing Coalition
WHERE ARE THE FEDERAL AND STATE FUNDS?

• Federal Sources
  – Subscribe to email alerts at www.grants.gov
  – HUD (e.g. CoC)
  – VA (e.g. SSVF)
  – SAMHSA
  – Reentry Grants
  – Medicaid

• State Sources
  – Challenge grant
  – State ESG
  – TANF

Note: If you have sources to add, please enter them in the webinar question section!
WHERE ARE THE LOCAL AND PRIVATE FUNDS?

• Local Gov’t and similar
  – General Revenue
  – Local ESG
  – CDBG
  – CSBG
  – PHAs
  – Children’s Councils
  – Other local initiatives

• Private funding
  – United Way
  – Philanthropists
  – Foundations (Banks, Hospitals, Family, etc.)
  – Chamber of Commerce
  – Universities

If you have sources to add, please enter them in the webinar question section!
Case Management and Operations
Takeaways from Participants

• Takeaway 1
• Takeaway 2
FUNDING CASE MANAGEMENT AND OPERATIONS TAKEAWAYS

1. Collaborate, collaborate, collaborate!
2. Don’t chase the money, but constantly scan the horizon for new funding paths for your mission!
WANT TO KNOW MORE? QUESTIONS?

Homeless Hotline: **844-280-2683**
Email: info@flhousing.org

Check out our upcoming and past webinars, workshops, and symposia at: - [http://www.flhousing.org](http://www.flhousing.org)
  - hover over **Training**, drop down box,
  - click **Homelessness**

Attend our Statewide Homelessness and Housing Conference in Orlando, August 30, 2015-September 2, 2015!
Register at: [www.flhousing.org](http://www.flhousing.org)