

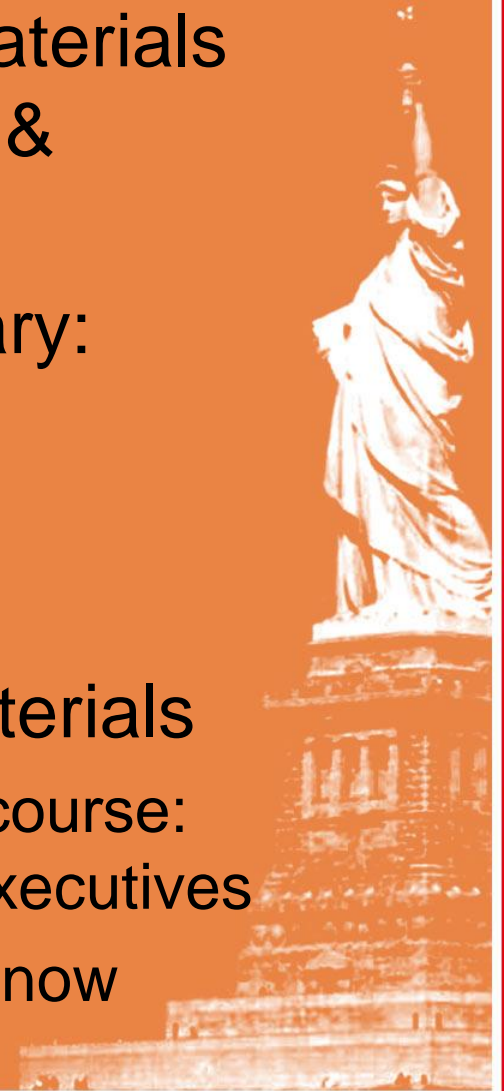


Nonprofit Capacity Building & Organizational Development

*2018 NPCNYS Annual
Conference
Monte Franke*

Background

- NPC asked HCR for training & materials for board/executive development & strategic planning
- HCR agreed to create online library:
 - Strategic planning
 - Financial management
 - Other topics to be determined
- Franke Consulting to develop materials
 - Adapt materials from FCG's online course: Strategic Management for CHDO Executives
 - Contract ends 12/31/18; need input now



Online Library

- Online library v. in-person training
 - Limited opportunities for in-person training
 - Travel limitations for executives/boards
 - Regular turnover of boards & executives
- Advantages of online learning
 - Lower cost of participation
 - Asynchronous learning: available whenever persons to be trained & when fits schedule
 - Adaptable: available to download and adapt to the specific needs of a nonprofit
 - Easy to update when appropriate



Design Parameters

- Resources need to be:
 - Organized & labeled
 - Easily navigable
 - Visually engaging
 - In “digestible bites”
- Web site with clear organization & links
- Recorded presentations - generally, no more than 10 – 20 minutes





- Under construction:
 - Strategic Planning
 - Financial Management



Strategic Planning

- Nonprofits need to be strategic
- But traditional planning models are too resource-intensive, too long in time frame and not nimble enough to respond to a rapidly changing environment
- NPC requested a planning model that can be self-administered & is appropriate for smaller organizations with limited resources



- Overview
 - Why nonprofits must be “strategic”
 - What is strategic planning?
 - Strategic planning in times of change
 - Roles in the planning process
 - Getting organized



Strategic Planning Process

Update mission, vision, values

Conduct SWOT analysis:
internal & external scans

Develop action plan: goals,
SMART objectives, strategies

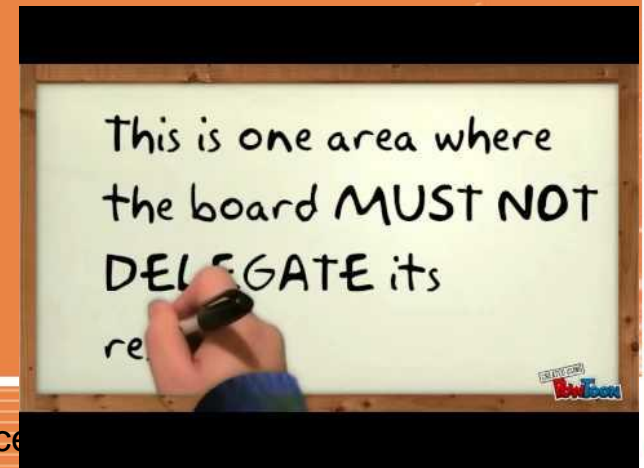
Implement the plan

Evaluate results & adjust



Financial Management

- Board members often not trained/skilled in financial management & oversight
- Most organizational problems appear as early “red flags” in the financials of the nonprofit
- Too much left to accounting staff or outside accountants



Financial Management Topics

- Overview
 - Why financial management is important
 - Board & executive roles in financial mgt
- Primer in accounting
 - Internal controls
 - Financial documents & reports
- Points of financial control for boards & executives



Executive Financial Control Points



Other Potential Topics for Library

- Strategic planning & financial management topics are under development
- Other topics suggested (depending on time and resources)
 - Board orientation & roles/responsibilities
 - Developing affordable housing
 - Meeting CHDO requirements



WE WANT TO
HEAR FROM YOU

What other topics should be covered in the
online library?

Which topics will be most useful to your
organization?

Input After Today

- Send to Cara @ NPCNYS
or
- Email Monte: MLFranke@aol.com
- Remember: materials must be completed by 12/31, so we need your suggestions soon!

