

Welcome

Nonprofit Fundamentals

*Who said starting and running a nonprofit would be easy? Because its not.*

Co-sponsored by: Hartford Public Library &

Hartford Foundation for Public Giving

Presenter: Roosevelt Smith

# About Me

## **Roosevelt Smith**

Roosevelt Smith has over twenty-eight years of rich and extensive experience in the nonprofit sector.

Consulting work has included large, small and volunteer-run nonprofit organizations in a wide array of mission areas such as youth development, housing, human services, human rights/social justice, environmental justice, food justice and arts.

Recovering ED – prior to starting consulting practice served for 15 years combined as a founding Executive Director for two nonprofits in Boston, MA.

# Purpose, Intentions & Agenda

**Purpose:** Learn how to build, manage, and sustain a nonprofit organization.

## **Intentions:**

- Engage
- Excite
- Educate
- Empower

## **Agenda for Today**

- Opening & Welcome
- What is a Nonprofit Organization?
- Six Fundamental Questions **(1 – 3)**
- Wrap up

# Introductions

## **WHO's In the Room**

Using the **chat** room shout yourself out:

Say Hello, and announce yourself Name, Organization (if affiliated with one) Position (Founder, Executive Director, Board Member, Volunteer, other)

## **WHAT'S on Your Head & Heart**

Then chat in one goal, intention or aspiration you have for your organization or initiative to achieve in the next 90 days.



## Holding Change

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*Unprecedented times, Volatility, Uncertainty and Change*

*Meditation*

*In this moment Breathe.....*

*Where there is breath there is life, and where there is life there is hope....*



# What is a nonprofit organization?

A nonprofit organization or foundation (NPO), also known as a non-business entity, not-for-profit organization, or nonprofit institution, is ***dedicated to furthering a particular social cause or advocating for a shared point of view***. In summation, it is a business/corporation that has been given ***tax-exempt status*** by the Internal Revenue Service (IRS) to ***further*** a religious, scientific, charitable, educational, literary, public safety or cruelty-prevention ***mission or area of work***. An organization needs to request 501(c) prior to operating with a tax exemption. ~ **Foundation List**

"An organization is a ***means to overcome the limitations of one person's contribution.***"

~Peter Drucker

**Ref. Handout Myth's About Nonprofits**

# Six Fundamental Questions



*(Day 1)*

**Why do we exist?**

**How do we behave?**

**What do we do?**



*(Day 2)*

**How will we succeed?**

**Who must do what?**

**What is most important?**

# Why do you exist? Purpose/Mission

*To thrive, a nonprofit organization must develop—and adhere to—a clear statement of its core purpose.*

**Kim Jonker & William F. Meehan III**

## **Ground Zero – Mission**

POLL (select one)

- Don't Have A Mission Statement
- Have, but not satisfied with it
- Have, and are satisfied with it

(Handout: Intro to mission Statements)

- Definition
  - What you do + who/what you do this for (why)
- Functions & Uses of a Mission/Statement
- Primary Audiences
- Guidelines



# Break

5 minute – Bio/Stretch break, feel free to mute and turn camera's off for 5 minutes

# How do we behave? Values

- Many organizations have lists of values on their website or in their annual report. However, few of these organizations have core values that are understood and used as active tools.
- Enduring set of principles that guide behaviors and decisions over time.
- Helps to attract the right people
- Informs culture (*Values x Behavior=Culture*, **Simon Sinek**)
- Articulating the core values of an organization is about ***discovery – not invention***. It's ***not about writing lists*** of the values you think your organization should have.

**What core values have you discovered for your organization? List in Chat.**

# What do you do? Scope of Work

- The work you do – the activities you undertake to advance your mission.
  - Opportunity(s) Problem(s): What opportunity(s) problem(s) are you trying to solve or change?
  - Cause – Is there an overarching cause?
- Focused – Not all things to all people

(Handout: Intro to mission Statements p 3)

# Wrap Up

- Summary of today's session
- Additional questions you have?
- Reminder Part 2 – 11:30 – 1:30 10/14/2021
- Please complete survey

Thank you!

Yvette Close Out.

Welcome

Nonprofit Fundamentals Part 2

*Who said starting and running a nonprofit would be easy? Because its not.*

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## Holding Change

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### *Meditation*

*To really understand the concept of "WE" you must lay down the selfish ways of "I".*

*WE can go further than I can.*

*WE can accomplish more than I can.*

*WE can strategize better than I can.*

*WE can bare more than I can.*

*WE are stronger than I am.*





# Six Fundamental Questions



*(Day 1)*

Why do we exist?

How do we behave?

What do we do?



*(Day 2)*

**How will we succeed?**

**Who must do what?**

**What is most important?**

# How will we succeed? Business Model

## Business/Funding Model

- Culmination of the first three questions – purpose, values, and scope of work + operations and financial model.
- Essentially your organization's **strategy** – Strategy is a coordinated set of actions and intentional decisions made to create and sustain an advantage in carrying out your mission.
- The Business model forms the basis and foundation to make plans – Business Plans for start ups, or strategic plans for more mature organizations.

Review (Handout: NBMC Master key)

# Action Planning

Action plan tool from **Alan Kay** – Fry the Monkeys Create a Solution

## Things to Think About

1. You and your team are the resources for change and growth.
2. Include any groups and/or activities and whether you need to communicate your plans with others.
3. Think about how you will notice progress.

1. Our goal and what it will look like when our team has accomplished it.

2. How do we see this helping with the unique needs of our beneficiaries and/or how is this in service of our mission?

3. Where will we begin? What will be the first visible steps?

- A.
- B.
- C.

4. With whom do we see ourselves collaborating and communicating to help make this happen?

5. When? What time frame for the actions will we have set up?

6. How will we be communicating our successes?

# Break

5 minute – Bio/Stretch break, feel free to mute and turn camera's off for 5 minutes

# Who must do what? Team/Talent

## Team consists of...

- Solid Board
- Volunteers
- Staff

## Building your team...

- What's Important?
  - ✓ Characteristics (right people on the bus)
  - ✓ Role/Expectations
  - ✓ Skills
  - ✓ Tasks to perform/Timing
- Exercise
  - List some characteristics and expectations
  - Decide on 3 – 5 immediate tasks for each

# Board Development

Resources for continued learning:

- Handout: Board Source Ten Basic Responsibilities of NP Boards
- Handout: Board Source Board Member Job Description

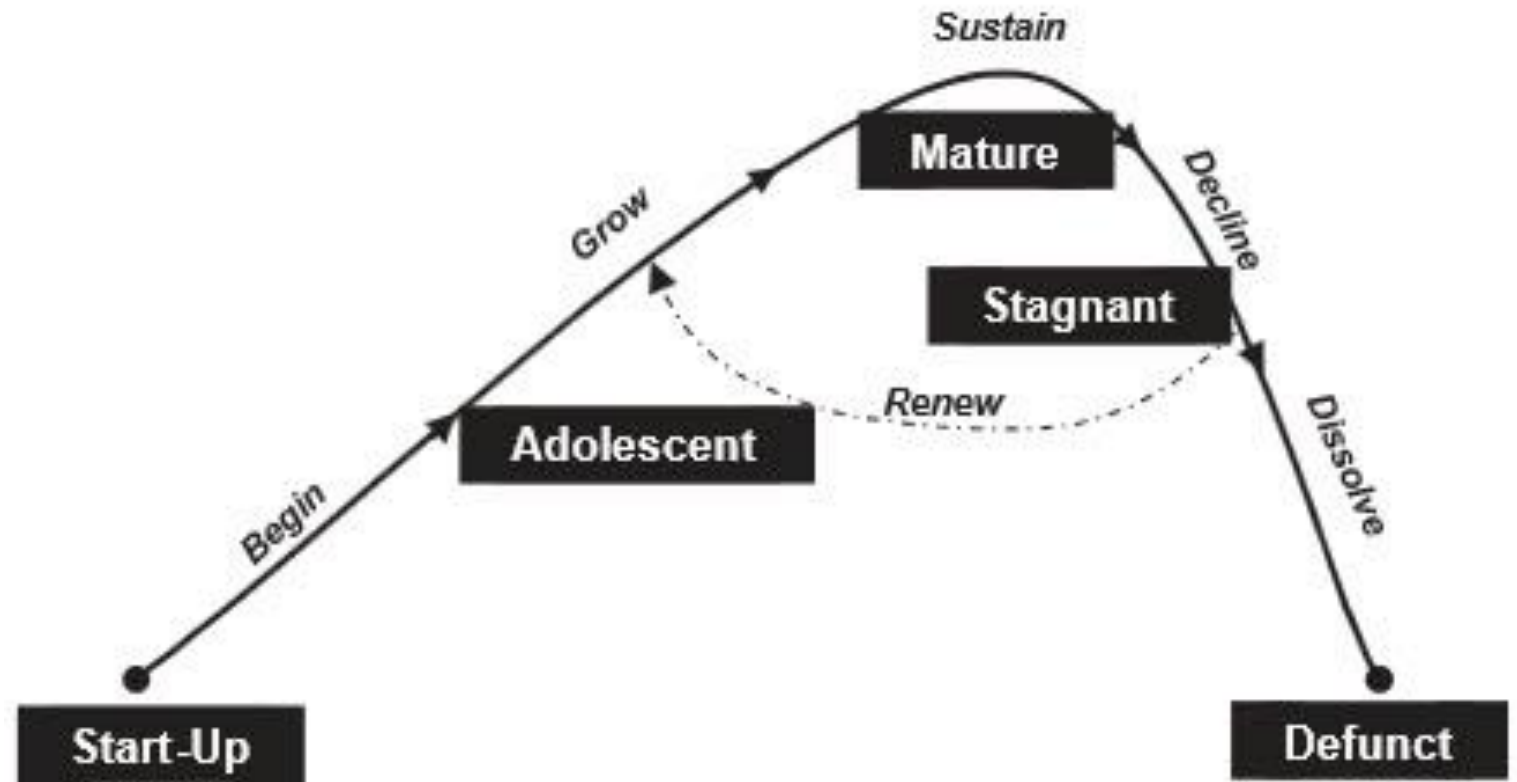
Online:

- Board Source - <http://www.boardsource.org/>
- Blue Avocado - <http://www.blueavocado.org/>
- CT Nonprofit Alliance - <http://ctnonprofitalliance.org/>
- Leadership Greater Hartford, Leaders On Board Program - <https://leadershipgh.org/>
- Pro Bono Partnership - [www.probonopartnership.org](http://www.probonopartnership.org)

# What is most important? Impact Measurement

- Funders expect to see that you are making a difference.
- Progress & Improvement: What does success look like programmatically and organizationally?
  - Handout – Outcome Measures
- Nonprofit Life Cycle

# Nonprofit Life Cycles





# Ways to measure impact

## Evidence/Indicators

1. A solid board of directors
2. Develop and implement plans
3. Develop and manage to a realistic budget
4. Success raising funds from (\*varied sources)
5. Data that shows your work and its impact

## Tools/Systems

1. By-laws, expectations, ongoing education, performance review
2. Action, Business, Strategic, Operational
3. Operating Budget, budget planning process
4. Funds Development Plan, multiple sources
5. Surveys, annual reports, case management, program reports

# Wrap Up

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- Additional questions you have?
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Thank you!

Yvette Close Out.