



## **2018 Capacity Building Training Application**

The American Savings Foundation and the Community Foundation of Greater New Britain have partnered to offer in depth and hands-on Capacity Building Training workshops to local non-profits based in or serving Berlin, New Britain, Plainville and Southington as part of a comprehensive capacity building initiative. A total of six (6) sessions will be offered by Danosky & Associates. The sessions are designed for Executive Directors who can be accompanied by Finance Directors, Development Officers, Chief Operations Officers and Board Members.

### **Workshop Topics/Dates and Times**

The workshops focus on six key areas and are based on responses to our recent survey of capacity building needs. A full description of each workshop is attached to this application:

- 1) Engaged Boards Make a Difference (March 21)**
- 2) Build a Strong Team of Staff & Volunteers to do More with Less (April 18)**
- 3) Strategic Planning - (May 16)**
- 4) Fundraising in Good and Bad Times - The Basics & Measuring Effectiveness (June 13)**
- 5) Major Gifts and Capital Campaigns for Organizations of Any Size (September 19)**
- 6) PR, Marketing and the Effective Use of New Media (October 17)**

Each workshop will be four hours in length, from 8:30 A.M. to 12:30 P.M. Locations will be determined but likely to be in New Britain. The first three hours will entail active teaching, some lectures, inter-active exercises and significant discussion. The fourth hour will be a "lab period" to provide participants time for individual reflection, preparation of the homework assignments and an opportunity to discuss topics and learning objectives among themselves. A D&A consultant will be on hand for this entire period to advise, coach, and answer questions.

### **Workshop Capacity and Participation**

Each workshop is limited to 15 non-profit organizations. Organizations can apply for as few as 1 workshop up to as many as all 6. The first 10 organizations to apply will also be eligible for free ad placement in a non-profit spotlight page in the New Britain Herald.

Those that attend 4 out of the 6 workshops will be eligible to apply for a grant award of up to \$2,000 at the end of the training session. The grant will support implementation of some aspect of what you learned from the sessions that will strengthen your organization. The award is not guaranteed but will be based on our review of an application from your organization.

## 2018 Capacity Building Training Application

**Nonprofit Organization:** \_\_\_\_\_

**Year Established:** \_\_\_\_\_

**Address:** \_\_\_\_\_

\_\_\_\_\_

**Telephone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Website Address:** \_\_\_\_\_

**Size of annual operating budget:** \_\_\_\_\_

**Current Board Chairperson name:** \_\_\_\_\_

**Do you have authorization from your Board to participate in this program? Y / N**

**Total number of paid staff:** \_\_\_\_\_ **Total number of volunteers:** \_\_\_\_\_

**1) Indicate which session(s) you are applying for (description for each is attached):**

\_\_\_ Engaged Boards Make a Difference (March 21)

\_\_\_ Build a Strong Team of Staff & Volunteers to do More with Less (April 18)

\_\_\_ Strategic Planning – (May 16)

\_\_\_ Fundraising in Good and Bad Time - The Basics and Measuring Effectiveness (June 13)

\_\_\_ Major Gifts and Capital Campaigns for Organizations of Any Size (September 19)

\_\_\_ PR, Marketing and the Effective Use of New Media (October 17)

**2) For each workshop you checked, indicate why each one is appropriate for you and your organization.**

**3) What current efforts are underway within your organization to make changes or improvements?**

- 4) How will your non-profit benefit from your participation? What are your goals?
- 5) What other training or capacity building has the organization participated in and what was the result?
- 6) Would your organization take advantage of a lending library with in-print and online resources for non-profits available at the CFGNB Foundation Center on Vine Street?  
Yes\_\_\_\_\_ No\_\_\_\_\_ If yes, what materials or online resources would be helpful to you?

**Applicant Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Printed Name:** \_\_\_\_\_

*(By signing I commit to attending all workshops I sign up for and completing homework and required reading prior to each session. I understand that if I participate in four of the 6 workshops, I will be eligible to apply for a grant of up to \$2,000 to implement something to increase organizational capacity that I learned from the workshops.)*

**Board Chair Signature:** \_\_\_\_\_

*(By signing I acknowledge, on behalf of the board, support of staff's participation in this training and a willingness to implement strategies learned to make changes that increase organizational effectiveness.)*

**Please include your 2018 Annual Operating Budget and most recent audit or 990. Email this application and attachments along with any additional documents to Joeline Wruck: [jwruck@cfgnb.org](mailto:jwruck@cfgnb.org) or mail them to:**

The Community Foundation of Greater New Britain  
Attn: Joeline Wruck  
74A Vine Street  
New Britain, CT 06052

**APPLICATION DEADLINE IS Friday, February 16, 2018**

***(Additional applications may be accepted during the year for individual workshops if space allows)***

## 2018 Capacity Building Workshop Descriptions

### 1) Engaged Board Members Make a Difference (March 21, 2018)

*Board members are encouraged to join this discussion*

BoardSource *Leading with Intent 2017* identifies four broad categories that provide the framework for how board work can most effectively be accomplished. This workshop will explore and highlight ways that boards can enhance their own effectiveness so as to be stronger advocates for the organizations they care so passionately about. These areas are:

- a) Having the right people on a board makes higher performance more likely. Who serves on a board, how boards are composed and organized as a collective body determines the effective functioning of a board.
- b) How a board conducts its work – from group dynamics to its relationship with the chief executive can help or hinder the board’s ability to carry out its work.
- c) How well a board fulfills its basic responsibilities, from strategic and adaptive leadership to external and ambassadorial role to succession planning will impact an organization’s performance
- d) Whether an organization is having the impact it seeks to achieve is the ultimate board responsibility. How do boards understand and eventually measure that impact.

### 2) Build a Strong Team of Staff & Volunteers that can do more with less (April 18, 2018)

*Chief operating officers and HR directors or managers are encouraged to join.*

This workshop will address how your organization can manage the inevitable changes that are coming. Shifts in funding, community priorities and government or foundation policies can have a significant impact on your organization. Building a strong team that can effectively navigate these changes and inspiring a collaborative culture will ensure an organization not only survives, but thrives. During this workshop we will explore how to assess your current team and its culture, focus on visible skills and where talent can be further developed, explore how you can shuffle the deck using your employee’s talents in different ways or better utilizing volunteers, build sustainable processes to create a culture of learning, invest in building and maintaining social relationships throughout the organization and leverage problems as opportunities for collaboration.

### 3) Strategic Planning (May 16, 2018)

*Board members and finance directors are encouraged to attend.*

*“What we need to do is always lean into the future; when the world changes around you and when it changes against you - what used to be a tail wind is now a head wind - you have to lean into that and figure out what to do ..... because complaining isn't a strategy.” Jeff Bezos*

Strategic plans become the guideposts for organizations and their boards – establishing priorities, setting goals, determining objectives and eliminating peripheral discussions that don’t move the organization forward. Creating a strategic plan that is dynamic and meaningful requires a commitment and an investment of time. During this workshop we will explore the key elements of a strategic plan and how to build a planning process:

- a) Assessment of Board strength and building consensus around a shared vision.
- b) Understanding of the internal and external influencers germane to the organization’s success
- c) Evaluating the financial health of the organization and building for long-term viability
- d) Review of the organization’s mission and evaluating impact of its programs
- e) Determining the priorities for the organization in the coming years
- f) Developing strategies to address the above, with deliverables, key responsibilities and timelines.

#### **4) Fundraising in Good and Bad Times - the Basics and Measuring Effectiveness (June 13, 2018)**

*Fundraising, communications staff along with Board Development Chairs are encouraged to join*

What nonprofits that raise a lot of money know is that focusing your attention where the money is will not only raise more money annually but make it possible for the nonprofit to grow, even in the most challenging of times. While it seems obvious, many nonprofits still run from event to event, sending out occasional appeals and grants along the way. This workshop will focus on the strategies of effective fundraising and how every shop, large or small, can implement a fundraising program that will sustain the organization even in the most difficult times. - Fundraising is a vastly misunderstood practice. The typical measure only looks at the cost of raising a dollar, which can be misleading. BoardSource, Guidestar, AFP and BBB recently launched a tool to measure fundraising effectiveness that focuses on three components: Total Fundraising Net; Dependency Quotient and Cost of Fundraising. Understanding these concepts will help your board better understand the cost and value of outreach, as well as the need to invest in building relationships and major gifts. With this understanding, the Board will be better able to understand its role, and support fundraising as an investment in the organization's overall health. Specific examples of how the board can take an active part in fundraising will round out the best fundraising practices.

#### **5) Major Gifts and Capital Campaigns for Organizations of Any Size (September 19, 2018)**

Eighty to ninety percent of philanthropic revenue comes from only 10-20% of donors. The majority of development offices are focused on tactics and not donors. Once you shift that paradigm, then you can experience the results that can only come from stewarding and cultivating donors -- and build a program that can sustain your organization. Securing a major gift is no accident. It is a strategic process, implemented over a period of time and culminates with both the donor and the charity reaping significant benefits. For the donor it is the ability to have an impact with a cause he or she is passionate about. For the organization it is the capacity to have significant financial support over the long-term to achieve its vision and goals.

This program will help development officers, executive directors and board members learn how to move donors from casual contributors to significant supporters. It will detail the key elements required:

- a) Identification and qualification of major donor prospects.
- b) Establishing cultivation and stewardship activities to deepen the donor relationship
- c) Engaging Board members meaningfully and appropriately in the process
- d) Preparing a strategy for each donor that will result in a major gift
- e) Conducting meaningful meetings with donors that result in ongoing support
- f) Implementing a moves management system to move the program forward and measure results

This workshop will also address Campaigns -- the Holy Grail of Fundraising! Campaigns are unique in fund-raising strategies. They work because they are so highly defined and organized. But they don't just happen -- they are structured, methodical, controlled and require careful planning before you even decide whether or not to conduct a campaign. And you don't want to enter into a campaign unless you know you will be successful. Having a strong major gifts program can be a pre-cursor to a campaign because having a strong donor base is essential to campaign success. This workshop will also address other key success factors that allow campaigns to succeed and over-achieve their goals.

## **6) PR, Marketing and the Effective Use of New Media (October 17, 2018)**

Essential in marketing and public relations, is having an understanding of the principles of an organizations' reputation and crisis management. We will focus on what constitutes an organization's brand, how you can build that brand, what is the difference between strategic marketing and spending resources on "great opportunities" that come your way. The elements of marketing will be reviewed including:

- ☒ Social media
- ☒ Public relations
- ☒ Web-site presence
- ☒ Video marketing
- ☒ New Media
- ☒ Collateral materials
- ☒ Creating an organizational identity