



## **2019 Capacity Building Training Application**

The Community Foundation of Greater New Britain will offer in-depth, hands-on capacity building training workshops to local non-profit organizations based in or significantly serving Berlin, New Britain, Plainville and Southington.

### **Workshop Series Description: Stronger Boards – Greater Impact**

Board members are the fiduciaries who steer an organization towards a sustainable future by adopting sound, ethical, and legal governance and financial management policies, and by making sure the nonprofit has adequate resources to advance its mission. But what does that really mean and how do board members execute that responsibility? In the nonprofit sector, the board of directors plays a pivotal role. A strong board can strategically guide the organization, ensure it is on track in fulfilling its mission, evaluate the funding available to meet its mission, help secure additional revenue so that the organization can be more effective, provide a sounding board to the chief executive and set direction for the organization. Most board members and board chairs come into their role with a lot of passion, but little knowledge or experience on how to be an effective board member. This workshop series targets key areas in board development so that board members can govern with greater confidence and serve their nonprofits well.

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

A total of five (5) sessions will be offered by Danosky & Associates. They are designed for Executive Directors or other staff as indicated and board members. Topics are based on responses to our 2018 workshop surveys. Each workshop will be 3.5 hours in length and take place at locations in New Britain from 8:00 to 11:30 A.M. A full description of each workshop is attached to this application:

- 1) The Chairman's Role – How to Raise the Bar (February 19, 2019/ snow date: Feb. 26)
- 2) Help! My Board Is ..... (March 20, 2019/snow date: Friday, March 29)
- 3) Financial Responsibilities of the Board (April 17, 2019)
- 4) Evaluating the Board (May 22, 2019)
- 5) The Board's Role in Fundraising (June 13, 2019)

### **Workshop Capacity, Eligibility and Selection**

Each workshop can accommodate 15 non-profits, 2 people per organization. Due to limited space, organizations will be selected to participate through a competitive application process. Organizations may apply for as few as 1 workshop or as many as all 5. This series is not designed for municipal or quasi-governmental organizations are. Volunteer-run organizations are eligible to apply as long as a governing board of directors is in place.

Organizations that attend 4 of the 5 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 was learned from the sessions that will strengthen your organization. The award is not guaranteed but will be based on our review of your application.

### **Additional Requirements**

- Unless there is an unforeseen emergency, attendance at your selected workshops is required.
- Unless noted, a board member must attend each session
- It is expected that all staff and board members attend the workshops in their entirety unless there is a pre-arranged agreement with CFGNB to leave early
- Participation includes completion of workshop surveys sent by the CFGNB
- If an organization does not participate in a workshop it agreed to attend, eligibility for a mini-grant may be forfeited.

# 2019 Capacity Building Training Application

Organization: \_\_\_\_\_ Year Established: \_\_\_\_\_

Executive Director: \_\_\_\_\_

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

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

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

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

If your organization is not based in our service area, what percentage are those you serve are from Berlin, New Britain, Plainville and Southington? \_\_\_\_\_

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):**

- \_\_\_\_\_ The Chairman's Role – How to Raise the Bar (February 19, 2019/ snow date: February 26)
- \_\_\_\_\_ Help! My Board Is ..... (March 20, 2019/snow date: Friday, March 29)
- \_\_\_\_\_ Financial Responsibilities of the Board (April 17, 2019)
- \_\_\_\_\_ Evaluating the Board (May 20, 2019)
- \_\_\_\_\_ The Board's Role in Fundraising (June 13, 2019)

**2) For each workshop you checked, indicate why each one is appropriate for 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?

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

*By signing I commit to:*

- Attend all workshops I sign up for in their entirety (unless there is an unforeseen emergency or there is a pre-arranged agreement with CFGNB to leave early)
- Have a board member attend each session (unless it is not required)
- Complete surveys sent to me by the CFGNB

*I further understand that if I participate in 4 of the 5 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. If I do not participate in a workshop I signed up for, I understand that I may forfeit my eligibility for a mini-grant.*

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

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

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

**Email this application 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 THURSDAY, JANUARY 31, 2019**

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

## 2019 Capacity Building Workshop Descriptions

Board members are the fiduciaries who steer an organization towards a sustainable future by adopting sound, ethical, and legal governance and financial management policies, and by making sure the nonprofit has adequate resources to advance its mission. But what does that really mean and how do board members execute that responsibility? In the nonprofit sector, the Board of Directors plays a pivotal role. A strong board can strategically guide the organization, ensure it is on track in fulfilling its mission, evaluate the funding available to meet its mission, help secure additional revenue so that the organization can be more effective, provide a sounding board to the chief executive and set direction for the organization. Most board members and board chairs come into their role with a lot of passion, but little knowledge or experience on how to be an effective board member. This workshop series targets key areas in board development so that board members can govern with greater confidence and serve their nonprofits well.

### Workshop Descriptions

All workshops will take place from 8-11:30 A.M. For all workshops except #2 below, board member participation is required. Each organization can bring 2 participants to each workshop, and possibly one more if space allows. Below we have indicated the appropriate staff/board participants for each training opportunity.

#### 1. **The Chairman's Role – How to Raise the Bar (February 19, 2019/ snow date: February 26)**

*For Executive Director and Board Chair. If space allows, Vice Chair or other officers may attend as well*

Every chair puts his, or her, own positive stamp on the board's culture, work and impact. It is an exciting opportunity for someone who is passionate about the work of a nonprofit. It can also seem like a daunting challenge. Where do you seek knowledge and guidance to help you fulfill this role, and at the same time make a meaningful difference to the organization? This workshop will address:

- Your leadership ability and how to use it to lead the board in fulfilling their roles
- The Board Chair's Role and the Board/Executive Director Partnership
- How the Board Functions: Board composition, committee structure, meetings, policies, procedures
- How the Board Works - Resource Development, Fiscal Oversight, Strategic and Program Planning
- Assessing the Board's Performance
- How to move your board from Good to Great, including recruiting the best board members
- Reflecting on your own legacy

#### 2. **Help! My Board Is ..... (March 20, 2019/snow date: Friday, March 29)**

*For Executive Directors of non-profit organizations*

You could fill in this blank with such a wide range of topics. My board is too involved, not involved enough, too demanding, or not providing enough direction, meets too often, doesn't meet enough. The role of the chief executive with the board – and specifically with the board chair – is often fraught with tension. We will explore what makes a good board/board chair/executive director relationship and what doesn't. Executive Directors will have the opportunity to problem solve, and trouble shoot different scenarios. It is often said that the position of Executive Director is the loneliest position. This will provide Executive Directors a safe place to have a discussion and an opportunity to form cohort groups for ongoing support.

### **3. Financial Responsibilities of the Board (April 17, 2019)**

*For Executive Director and Board Treasurer, Finance Directors*

One of the central responsibilities of a nonprofit board is to maintain financial accountability of the organization. Board members act as trustees of the organization's assets to ensure it has the funds it needs to operate effectively and that the organization's financial situation remains sound. Yet when it comes time to give the financial report, most board members eyes glaze over. This workshop will discuss the importance of financial literacy and how board members can execute this fiduciary responsibility. The topics that will be addressed are:

- Board members' fiduciary responsibility
- Budgets and Forecasts – and what the difference is
- Nonprofit financial statements – and how they differ from the for-profit world
- Audit and IRS Form 990 – when and how to use them effectively
- What is the board's role in risk management
- How you develop policies and procedures – and make them work for you

### **4. Evaluating the Board (May 20, 2019)**

*For Executive Director and Board Chair, Governance Chair*

Effective boards evaluate their performance as a board every few years. What goes into a board self-evaluation and how do you use it to strengthen your board? Board members who take this workshop will be offered the opportunity to undertake a self-evaluation (for an additional fee) and have it reviewed by a BoardSource certified governance trainer who will:

- Analyze your Board Self-Assessment (BSA) results,
- Identify actions your board might take to strengthen its practices and performance,
- Discuss recommended next steps with several of your board leaders in a 45-minute conference call
- Provide a PowerPoint summary to present your assessment information to your full board.

### **5. The Board's Role in Fundraising (June 13, 2019)**

*Board Chairs, Development Chair, Executive Director, and development officers*

For too long we have been recruiting Board members with the expectation of "Give and Get." Not only is this discouraging to the new Board member; it doesn't represent the best use of their time and talent. With the average non-profit losing nearly 57% of their donors annually, it's time to stop asking Board members to ask for money and teach them to build relationships with people who can sustain the organization for the long-term. Essentially, we want to learn how to 'date' our donors and build a wonderful future together.