

## **Technical Assistance and Training to Persevere Through the Pandemic Together**

### **APPLICATION INSTRUCTION PACKET**

#### **OVERVIEW**

Thank you for the interest in the Appalachian Regional Commission's technical assistance program for nonprofit organizations. This special resource center recognizes the catastrophic impact the COVID-19 pandemic has had on the region, and particularly on nonprofit organizations.

To lessen the pandemic's immediate impact and future consequences, nonprofit organizations are invited to apply for a free technical assistance program in one of four topic areas:

1. **Short-term Financial Management** - At the conclusion of this course, you will have the necessary financial tools in place and a plan to stabilize and sustain your operations.
2. **Long-term Financial Management** - At the conclusion of this course, you will have a plan to restructure your programs and services in order to provide for long-term financial stability and growth.
3. **Mission and Operations** - At the conclusion of this course, you will have reviewed your mission in light of COVID-19, identified the key issues you must address in the short term, and reworked your management process and operations for greater sustainability.
4. **Fundraising** - At the conclusion of this course, you will have a realistic and actionable Development (i.e. fundraising) Plan capable of providing sustained and scalable support for your organization.

During fall and winter sessions, instruction will be conducted virtually through a dedicated, private online portal. The schedule for the instruction sessions are:

- Fall 2020: 6-Week Course (November 9 – December 18, 2020)
- Fall 2020: 11-Week Course (November 9 – January 22, 2021)
- Winter 2021 A: 5-Week Course (January 25 – February 26, 2021)
- Winter 2021 B: 5-Week Course (March 1 – April 2, 2021)
- Winter 2021: 10-Week Course (January 25 – April 2, 2021)

The five- and six-week courses are more intense instruction, where the 10- and 11-week instruction includes similar instruction at a more leisurely pace.

Experts will lead weekly “live” instruction, share pertinent resources, oversee completion of assignments, and lead topical discussions specifically designed for nonprofit organizations. You will also receive individual consultation to help your organization move toward sustainability. Your participation in this program will require approximately 40 to 50 hours of dedicated work during the selected session. Access to the Appalachia Nonprofit Resource Center portal will be available through 2021.

### CRITERIA FOR PARTICIPATION

This free technical assistance program is open to all nonprofit organizations located in the ARC region, with a pre-COVID-19 minimum annual operating budget of \$100,000 and 2 full-time employees. One of the potential two participants for the instruction program must be the organization’s CEO/executive director.

### HOW TO APPLY

To be considered for participation in one of the training sessions, complete the online 15-question application by close of business (5:00pm EDT) on **Friday, October 16, 2020**.

Be prepared to request your preferred topic areas (short-term management, long-term financial management, mission and operations, or fundraising) and also prioritize in order the desired session (Fall 6-week course; Fall 11-week course; Winter A or B 5-week course; or Winter 10-week course).

Please inform your [ARC State Program Manager](#) when you apply for this initiative.

### EVALUATION

Applications will be evaluated on the thoroughness of the information. In addition to the minimum criteria outlined above, evaluation is based on the severity of COVID-19’s impact on the organization and its ability to deliver its mission; alignment with or contribution to ARC’s strategic goals; and how instruction will help current organizational concerns.

For more information regarding the evaluation process and criteria for participant selection, see the “Frequently Asked Questions” at the end of this document or contact [nonprofitTA@arc.gov](mailto:nonprofitTA@arc.gov).

## SELECTION

Applicants will be notified the week of October 26 as to whether they have been selected for participation in the instruction program. Every effort will be made to grant the first or second choice for the instruction and the requested session (length/date). Cohorts comprised of 3-4 organizations will be organized to enhance the collaborative learning experience and engagement.

On notification, applicants will be asked to confirm names and contact details for up to two participants (including the Executive Director/CEO) from the organization. Additional information about the organization may be requested to help the instructors become more knowledgeable regarding the current issues impacting survival.

## FREQUENTLY ASKED QUESTIONS

- 1. What organizations can participate in the Cohort Instruction?**  
Participation is open to any nonprofit organization (recognized by the IRS) with an annual pre COVID-19 operating budget of \$100,000 or more, at least two full-time employees, and located in the one of the 420 ARC counties.
- 2. How many people from my organization can participate?**  
Up to two. One must be the executive director/CEO. The other individual may be assigned once the organization has been selected for participation, and the topic area and session has been confirmed.
- 3. What is a Cohort?**  
A cohort is comprised of three to four organizations participating in the same topic area at the same time. Up to 30 cohorts representing 120 organizations will be selected for participation in the program. The cohorts will be scheduled for a Fall 2020 or Winter 2021 session in the four areas.

**4. How will the Cohorts be selected?**

Cohorts will be selected based on three considerations: geography, sector and/or size of organization. Hargrove International and ARC will assemble cohorts with similar needs or desired instruction, choice of topic area and requested session.

**5. What are the topic areas of instruction?**

There are four topic areas of instruction: 1) short-term financial management; 2) long-term financial management; 3) mission and operations; and 4) fundraising.

**6. How long is an instructional session?**

There are two lengths of instruction scheduled: a more intensive 5- or 6-week session, or a more leisurely 10- or 11-week session. Content delivery and instruction is the same for both sessions; participants have one week to engage in the topics and instruction in the shorter session, and two weeks to collaborate in the longer session. Holiday schedules have been factored into the fall schedule, hence the expansion to a six-week or 11-week program.

**7. When are the instructional sessions scheduled?**

Five sessions are currently scheduled:

- Fall 2020: 6-Week Course (November 9 – December 18, 2020)
- Fall 2020: 11-Week Course (November 9 – January 22, 2020)
- Winter 2021 A: 5-Week Course (January 25 – February 26, 2021)
- Winter 2021 B: 5-Week Course (March 1 – April 2, 2021)
- Winter 2021: 10-Week Course (January 25 – April 2, 2021)

**8. How much time do I need to dedicate to the instruction?**

Your participation in this program will require a total of approximately 40 to 50 hours of dedicated work during the selected session, regardless of the session's length.

**9. Who is teaching the instruction?**

ARC has assigned Hargrove International to oversee the instruction. The consulting firm has secured top experts in nonprofit management, operations, fundraising, and financial management to instruct the courses. These specialists have wide range of experience with both emerging and established nonprofits across a broad spectrum of the nonprofit world. Most have worked for or with organizations in Appalachia.

**10. How is the instruction provided?**

The instruction is delivered online, through a secure and private portal for Cohort use only. A typical week will include live Zoom instruction, online resources to review, application of the principles covered to your organization, individual consultation, cohort discussion, and the opportunity to chat one-on-one with the instructors and other members of your cohort.

**11. What can I expect to learn from the instruction?**

The instruction is designed to provide real-time, practical solutions to help nonprofit organizations survive the impacts of COVID-19 and move toward sustainability for the organization. Here are the proposed outcomes for each of the topic areas:

Short term Financial Management - you will have the necessary financial tools in place and a plan to stabilize and sustain your operations.

Long term Financial Management - you will have a plan to restructure your programs and services in order to provide for long-term financial stability and growth.

Mission and Operations - you will have reviewed your mission in light of COVID-19, identified the key issues you must address in the short term, and reworked your management process and operations for greater sustainability.

Fundraising - you will have a realistic and actionable Development (i.e. fundraising) Plan capable of providing sustained and scalable support for your organization.

**12. What content will be covered in each of these topic areas?**

Below is a general overview of the content for each topic area.

Short term Financial Management – Participating organizations will have the necessary financial tools in place and a plan to stabilize and sustain their operations. During the course, participants will:

- Review current financial tools, policies and protocols – and implement any changes necessary to provide for effective short-term financial management

- Evaluate and ascertain any opportunities to conserve resources and improve the organization's ability to continue operations with minimal impact on programs and services
- Understand the mechanics of mergers and determine if their organization should pursue that option or other such a strategic alliances
- Review current funding sources in light of current “best practices” and implement any changes necessary to maximize revenue
- Ascertain whether expense reductions are necessary and – if so – make those adjustments using objective criteria.

Long term Financial Management – Participating organizations will have a plan to restructure their programs and services in order to provide for long-term financial stability and growth. During the course, participants will:

- Review current thinking regarding the long-term impact of the pandemic on society, focusing on likely changes to the nonprofit sector
- Develop multiple scenarios and evaluate their organization's options for each
- Taking a balance sheet approach – review their current financial tools, policies and protocols – and implement any changes necessary to provide for effective long-term financial management
- Review their Mission and Vision statements and determine whether they are appropriate for the long-term
- Identify long-term financial goals – again, using a balance sheet approach – and develop the broad-form strategies needed to attain those goals.

Mission and Operations – Participating organizations will have reviewed their mission in light of COVID-19, identified the key issues they must address in the short term, and reworked their management process and operations for greater sustainability. During the course, participants will:

- Determine whether their current Mission and Vision statements are still appropriate and – if not – develop a process to review and revise those key documents
- Identify the three to five Key Issues that must be addressed immediately in order to provide for stability as the basis for growth
- Understand the mechanics of mergers and determine if their organization should pursue that option or other strategic alliances
- Evaluate their current programs and operations against pre-determined objective criteria
- Understand the ten generally accepted responsibilities of nonprofit boards and evaluate their own board against that standard

- Understand how organizations and individuals react to change, and have a plan to encourage broad support for any necessary change from all stakeholders.

Fundraising – Participating organizations will have a realistic and actionable Development (i.e. fundraising) Plan capable of providing sustained and scalable support for their organization. During the course, participants will:

- Understand the short- and long-term impact of the pandemic on nonprofit fundraising
- Evaluate their fundraising efforts according to the Three Measures of Fundraising Effectiveness
- Determine their current Funding Model and evaluate its viability now and in the future
- Explore – in detail – one or two fundraising mechanisms with the greatest potential for long-term growth
- Explore the board’s key role in fundraising and how best to promote a “culture of philanthropy” throughout their organization.

**13. Can I take more than one session?**

Unfortunately, no. The program is designed to provide maximum opportunity for as many cohorts as possible without compromising the individual instruction.

**14. What happens if I am selected and then can’t participate in the assigned session?**

You may be included on a waitlist for other scheduled sessions. You may also access information posted on the Appalachia Nonprofit Resource Center portal.

**15. If not selected, are there other ways to obtain information and resources to help my organization survive the impacts of COVID-19?**

Yes. The Appalachia Nonprofit Resource Center will include timely posts of highly curated information for access by all nonprofit organizations based in the ARC region. These resources will still focus on the four topic areas to serve as aids for nonprofit organizations seeking survival and post-COVID-19 recovery.

**16. Will resources be available to nonprofits organizations after the conclusion of the instruction sessions (in 2021)?**

Yes. Appalachia Nonprofit Resource Center plans to post additional resources on the throughout 2021. The Center will also establish and monitor an “alumni” discussion portal so that the organizations may exchange information and provide updates on their organization’s course for sustainability post COVID-19.

**17. Whom do I contact if I have additional questions about the Appalachia Nonprofit Resource Center, the application or instruction?**

Please contact [nonprofitTA@arc.gov](mailto:nonprofitTA@arc.gov) with any questions or if you need additional information.