Appalachia
Nonprofit
Resource Center

APPLICATION INSTRUCTION PACKET:
Fall 2021

OVERVIEW

Thank you for your interest in the Appalachian Regional Commission's (ARC) Technical Assistance Program for nonprofit organizations.

This dedicated Resource Center was initially developed by ARC in response to the catastrophic impact of the COVID-19 pandemic on the region, particularly on Appalachia's nonprofit organizations. It has evolved into a resource center designed to foster long-term sustained growth and sustainability for Appalachia's diverse and vibrant nonprofit sector.

During its first round of offerings, 97 nonprofit organizations successfully completed the Technical Assistance Program and are now taking advantage of several offerings specifically designed for alumni. Anecdotal feedback from course evaluations generated numerous positive comments, including:

"Excellent experience. [I] would recommend it to anyone and would also recommend its expansion so more organizations can participate."

"By participating in the program I immediately was able to use the training from day one. By having the credibility of ARC, it strengthened our efforts to facilitate change."

"This is real-life stuff" And I loved learning from my colleagues in the course!"

Interested nonprofit organizations are invited to apply for free technical assistance and coaching in one of four topic areas:

1. Financial Management – Participating organizations will receive the necessary tools to produce an actionable plan for long-term financial growth and stability. During the course, participants will:
    - Evaluate, using an interactive online tool, the current state of their organization's financial management
    - Review, evaluate, and – if appropriate – revise their cash management mechanisms

- Be instructed on how to read a Balance Sheet and determine their financial health using several generally-accepted ratios found in that report
- Review the five essential elements of effective financial policies and evaluate their own policies and procedures against that standard
- Explore several approaches to budgeting and understand the key role the Balance Sheet should play in that process.

2. Programs and Operations – Participating organizations will have reviewed their mission, vision, and values, evaluated existing programs and services using objective criteria, and structure a plan to optimize their impact for the long term. During the course, participants will:

- Determine whether their current mission, vision, and values are still appropriate and – if not – develop a process to review and revise those key documents
- Evaluate their programs and services using a Matrix Map
- Comprehend the value of the Dual Bottom Line
- Understand the role that Dashboards play in tracking and evaluating an organization's effectiveness
- Explore the value of partnerships and ascertain whether a strategic alliance or restructuring is worth pursuing
- Discuss how to increase diversity and inclusion within organizations, programs, leadership and align with constituents
- Review several approaches to planning, including scenario planning, paradigm planning, rapid prototyping, and traditional strategic planning.

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

- Explore the likely long-term impact of the pandemic on nonprofit fundraising

- Review current "best practices" in the areas of digital fundraising and virtual/hybrid events
- Evaluate their current fundraising efforts according to the Three Measures of Fundraising Effectiveness
- Determine their current Funding Model and evaluate its viability now and in the future
- Identify and 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.

4. Board Development (New) – Participating organizations will strengthen their governance, provide for ongoing leadership development and succession planning, and maximize their board's fundraising potential. During the course, participants will:

- Assess their board's performance in each of the ten generally accepted areas of nonprofit board responsibility
- Profile their board's current makeup and compare it with their "ideal" profile with respect to sectors represented, skill sets, attributes, and demographics
- Review and revise their board member job description, committee structure and charters
- Develop a self-evaluation mechanism to track the board's performance against identified goals
- Structure a plan to promote ongoing board development and provide for effective succession planning for board leadership
- Understand how to foster a "culture of philanthropy" and maximize the board's charitable giving and fundraising prowess.

Instruction will be conducted virtually through a dedicated, private online portal. Classes begin the week of September 13, 2021 and conclude the week of November 15, 2021.

Highly qualified content specialists will lead "live" instruction sessions for Cohorts (each consisting of three or four nonprofit organizations); share pertinent resources; oversee completion of assignments; and lead topical discussions specifically designed for nonprofit organizations. Each organization will also receive five individual consultation sessions designed to assist participants in their work and address the organization's unique needs.

Participation in the Technical Assistance Program will require approximately four to six hours of dedicated work each week throughout the 10 week course of instruction.

Instruction will be supported via the Resource Directory, an online collection of highly-curated materials in each of the four topic areas. Easily searchable, the Resource Directory will be made available to participants for six months following the conclusion of instruction (i.e. through June of 2022).

CRITERIA FOR PARTICIPATION

This free Technical Assistance Program is open to all nonprofit organizations located in the ARC region, with a minimum annual operating budget of $100,000 and at least two full-time employees. Each organization may designate up to two individuals – either board or staff members – for participation. One of the designated participants 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 application by close of business (5:00pm EDT) on Friday, August 6, 2021.

Be prepared to request your two preferred topic areas (Fundraising, Financial Management, Programs and Operations, or Board Development) and also note whether you will be applying as a pre-determined Cohort (i.e. three or four organizations requesting the same course).

> Note: Organizations need not apply as part of a predetermined Cohort. Organizations that do apply as a predetermined Cohort must each apply individually. Applying as a predetermined Cohort does not count in favor of or against an organization.

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

EVALUATION

Organizations will be evaluated on the thoroughness of the information provided in the application. In addition to the minimum criteria outlined above, evaluation is based on the organization's 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.

SELECTION

Applicants will be notified the week of August 23 as to whether they have been selected for participation in the Technical Assistance Program. Every effort will be made to grant each organization's first or second choice of topic area (Fundraising, Financial Management, Programs and Operations, or Board Development).

Those organizations accepted will be clustered into Cohorts comprised of 3 or 4 organizations in order to enhance the collaborative learning experience and engagement. Every effort will be made to accommodate those organizations that applied as members of a predetermined Cohort.

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.

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 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, including board or staff members. One participant must be the executive director/CEO. The other individual may be assigned once the organization has been selected for participation, and the topic area has been confirmed.

3. What is a Cohort?
   A Cohort is three to four organizations assigned to the same topic area to receive instruction as part of a small group. Up to 16 cohorts comprising 64 organizations will be selected for participation in the program.

4. How will the Cohorts be selected?
   Cohorts will be selected based on three considerations: geography, sector, and/or size of organization. Hargrove International (Project Managers) and ARC will assemble Cohorts with similar needs or desired instruction and choice of topic area.

5. What are the topic areas of instruction?
   There are four topic areas of instruction: 1) Financial Management; 2) Programs and Operations; 3) Fundraising; and 4) Board Development (newly added).

6. How long is an instructional session?
   Instruction will take place over a 10-week period.

7. When are the instructional sessions scheduled?
   Instruction is set to commence the week of September 13, 2021 and conclude the week of November 15, 2021. Each content specialist will set his/her own schedule for when the group instruction and individual coaching will occur during the 10-week period. This schedule will be provided when organizations are notified as to their acceptance into the Cohort.

8. How much time do I need to dedicate to the instruction?
   Your participation in this program will require a total of approximately four to six hours of dedicated work each week, with a combination of class sessions, readings, assignments, and one-on-one consultation.

9. Who is teaching the instruction?
   ARC has assigned Hargrove International to oversee the instruction. Hargrove International has secured top experts in nonprofit

management, operations, fundraising, board development and financial management to lead the courses. These specialists have a wide range of experience as both staff and consultants 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. Each course is structured around five learning modules that address specific topics, issues and/or tools.

    During each two-week module, organizations will participate in live Zoom instruction, review online resources, apply the principles covered to their organizations in the context of assignments, and take advantage of individual consultations with their instructor. Participants may also engage in discussion groups and have the opportunity to chat one-on-one with their instructors and other members of their cohort.

11. **Can I take more than one session?**
    Unfortunately, no. The program is designed to provide the maximum opportunity for as many Cohorts as possible to participate without compromising the individual instruction.

12. **Are alumni of the Fall 2020 and Winter 2021 Technical Assistance program eligible to apply?**
    Yes, although alumni must apply for a different topic area than the one taken during the inaugural program.

13. **If not selected, are there other ways to obtain information and resources to help my organization post-COVID 19?**
    Yes. The Appalachia Nonprofit Resource Directory will include timely posts of highly curated information for access by all nonprofit organizations based in the ARC region. These resources will focus on the four topic areas to serve as aids for nonprofit organizations as they build toward the future.

14. **Will resources be available to nonprofit organizations after the conclusion of the instruction sessions?**
    Yes. Hargrove International will continue to post additional materials on the Appalachia Nonprofit Resource Directory through June of 2022.

15. **Whom do I contact if I have additional questions about the Appalachia Nonprofit Resource Center, the application or instruction?**
    Please contact nonprofitTA@arc.gov with any questions or if you need additional information.