

The INS Group provides the following organizational development and capacity building workshops:

Grassroots Fundraising and Philanthropy in Diverse Communities

Historically, philanthropy in diverse communities has gone unrecognized. Often the relationship between philanthropists and diverse communities is one of giving to people from diverse communities not giving by such communities. This workshop will review the depth and breadth of historical giving in diverse communities and traditions that impact giving. Nonprofits have to be creative and responsive to how things are done in a given community without making assumptions. Trends in giving for different cultures with a focus on both new and old traditions will be discussed. Traditional definitions of philanthropy will be discussed and grassroots fundraising strategies for engaging diverse groups as donors will be identified. Participants will acquire critical awareness, skills, and systems to grow and sustain a base of diverse donors and support.

Learning Objectives

Participants will:

- Become aware of new and old traditions and the impact on trends in philanthropy among different cultures.
- Learn multiple strategies for making organizations attractive to diverse communities and building relationships with diverse donors will be discussed.

Beyond the Grant - Cultivating Relationships, Capacity Building and Sustainability

Project sustainability denotes an organization's ability to accurately determine and maintain desired outcomes, achieve long-term growth, and change in accordance with changing community conditions and needs. This workshop will focus on strategic financing and stewardship, the development of a broad based of community relationships, and communication strategies to facilitate long-term collaborations. Participants will learn the key elements of an effective sustainability plan/strategic fund development plan and concrete actions to ensure sustainability. New fundraising trends and resource development strategies including collective impact, social entrepreneurship and earned income will be shared.

Learning Objectives

At the end of the workshop, participants will be able to:

- identify the key elements of an effective sustainability plan/strategic fund development plan
- identify specific strategies for sustaining organizations and apply fundraising strategies to their own organization based on current trends fundraising and philanthropy

Fundraising 101: Effective Resource Development Strategies—Planning and Implementation

What are the most effective and successful methods of raising money? Discover the nuts and bolts, ideas and activities to help fundraise. This workshop features: new trends in giving, establishing an annual campaign, effective strategies for cultivating life-long individual and corporate donors, special events planning, the board's role in fundraising, and an outline of a fund development plan. Other important topics include creating a case statement, prospect research, fundraising materials and administrative systems and procedures.

Learning Objectives

At the end of the workshop, participants will be able to:

- identify new trends in giving/philanthropy
- outline the components of strategic fund development plan
- define the board's role in fundraising and help to increase board involvement
- describe the infrastructure needed for fundraising (staffing, fundraising software, materials)
- identify innovative fundraising strategies (i.e. social enterprise, online campaigns, etc.)

How to Grow Your Individual Donor Base

Raising money from individual donors is key to the survival of nonprofit organizations - and finding and cultivating individual donors is a work-intensive, long-term investment. Participants will learn how to master effective techniques for successful individual giving, including conducting prospect research, cultivating individual support, making "the ask" and garnering stewardship. You will discover where to start your prospect research, how to find the best research sites and how to utilize the data to cultivate and solicit potential donors. Participants will also find out how to build and use a donor database to successfully implement fundraising strategies.

Learning Objectives

At the end of the workshop, participants will be able to:

- locate specific sources for potential individual donors
- identify the most-effective "best practices" related to building relationships with individual donors
- understand the critical steps in making "an ask"
- create an action plan to increase board engagement in individual donor development

Four Steps to Successful Fundraising: Plan, Plan, Plan and Work

A strategic fund development plan is the framework for a nonprofit's development efforts and part of sound financial planning. It helps you plan for your future and ensure your organization's stability. Strategic fund development planning cultivates multiple revenue streams; set priorities, strategies, and goals; and limits crisis fundraising. This workshop will outline the key components of a strategic fund development plan including an evaluation plan and management plan and steps to develop a plan. Participants will have an opportunity to conduct an assets inventory, develop a case statement and begin to identify potential funding streams.

Learning Objectives

At the end of the workshop, participants will be able to:

- identify the key elements of a strategic fund development plan
- develop a planning process for creating strategic fund development plan
- assess resource development processes and identify ways to improve the implementation of resource development

An Effective Nonprofit Board - Roles, Responsibilities, Recruitment and Orientation

What are the roles and responsibilities of a nonprofit board of directors? How should a board operate to ensure maximum effectiveness? This interactive workshop will introduce nonprofit staff and board members to the principles of effective governance by defining the basic roles and responsibilities of the board and examining strategies for building effective board structures. Topics explored include strategic recruitment and orientation of board members, trends in board membership and board development.

Learning Objectives

At the end of the workshop, participants will be able to:

- identify the roles and responsibilities of the board of directors
- identify specific recruitment and orientation strategies for building an effective board
- identify specific ways to increase board participation in fundraising

Fundraising and the Board of Directors

Changes in the economic environment require that organizations and leaders approach their work differently in order to build capacity and ensure sustainability. This workshop focuses on the roles that board members play in fundraising including donor cultivation, the case for support, making “the ask” and stewardship. Participants will learn the practical steps used by board members to fundraise and to get over fundraising fears. This interactive workshop includes case studies and role play exercises. New trends in philanthropy and resource development will be shared.

Learning Objectives

At the end of the workshop, participants will be able to:

- identify the most effective “best practices” that ensure greater fundraising success
- identify specific strategies to increase board participation in fundraising
- identify ongoing techniques to overcome fundraising fears
- understand the critical steps in making “an ask”
- apply fundraising strategies based on *new* resource development trends relevant to their own organization

Grant Writing

If you are a beginning grant writer, this workshop will provide you with the essential tools needed to write a successful grant proposal from start to finish. For those more experienced, this workshop will sharpen your skills and keep you up-to-date through discussions of current grant writing trends. Learn about the grantsmanship process - from foundation research and cultivation to the development and writing of a winning proposal. You will learn about the typical questions funders ask when considering a proposal and the criteria used. Workshop participants will have an opportunity to review and critique a proposal. Tips for ensuring grant compliance and improving your chances of future grant success will be discussed.

Learning Objectives

At the end of the workshop, participants will be able to:

- implement effective processes and practices that lead to successful grant writing including how to build relationships with funders
- conduct grant research via the Internet, publications and other sources and prioritize prospects
- write the essential components of a grant proposal package including: cover letter, introduction, problem or need statement, goals and objectives, methodology, evaluation, the budget, future funding and executive summary
- determine the most effective writing strategies and styles for various grant applications
- evaluate and assess grant proposals after having an opportunity to review and critique a well-written proposal during this workshop
- ensure compliance and report on a grant's progress and impact

Advanced Grant Writing

Building from the *ABCs of Grant Writing*, this workshop is designed for those who seek to increase their effectiveness in the field of grant writing and grant management. The workshop will include: Request for Proposal Analysis, Hands-On-writing, Use of Statistics, Collaboration, Identification of Support Documentation, and Sharpening Your Grant Writing Skills. Your pre-workshop assignment will be the delivery of a well-developed idea for a grant proposal and you are encouraged to have identified a specific grant request from a private, corporate foundation or federal or state grant opportunity. This session features small group work and one-on-one technical assistance. The *ABCs of Grant Writing*, other workshop work and/or knowledge of grant writing basics are recommended prerequisites to this workshop.

Learning Objectives

At the end of the workshop, participants will be able to:

- evaluate a request for funding and customize a proposal to match the grant maker's interest
- develop a needs assessment proposal strategy
- formulate broad goals and measurable objectives
- write grant proposal components in compliance with grant instructions and demonstrate the mechanics and logic of good expository writing

Grants Management and Compliance – Beyond the Award Letter

This session will guide participants through the grants management process, from preparation of a grant proposal to programmatic and fiscal report preparation. Topics include: project team implementation, monitoring and reporting requirements and fiscal management and accountability. Practical tips for ensuring compliance and improving chances of future success will be presented. At the end of this session participants will understand how to organize for the receipt and management of funds, develop a team project management plan, create a system for compliance management and maintain an effective system for financial management.

Learning Objectives

At the end of this session participants will know how to:

- organize for the receipt and management of funds
- implement specific steps for developing a team project management plan
- create a system for compliance management and maintain an effective system for financial management

Program Evaluation: Possible, Practical, & Painless

This workshop will help your nonprofits conduct precise and appropriate project evaluations and then communicate and use the results of evaluation effectively. Participants will learn how to use evaluation as a tool for decision-making, strategic planning, reporting, or program modification. Participants will also learn how project evaluation serves as a tool to demonstrate a nonprofit's performance, increase its abilities for obtaining funds or future planning, and fulfill the organizational objectives. By communicating the results of the evaluation, your organization can inform its staff, board, clients/customers, funders, the other stakeholders about the benefits and effectiveness of your organization's services and programs.

Learning Objectives

At the end of the workshop, participants will be able to:

- describe the key features of a strong and economical program evaluation
- articulate ways to develop or improve the evaluation process
- identify structures that are already in place that support ongoing evaluations
- distinguish the types of evaluation plans
- develop an effective and relevant evaluation dissemination plan

The Fundamentals of Effective Strategic Planning

A well-designed strategic plan provides organizational direction, helps to set priorities, assists with budgeting and resource allocation, and improves overall organizational effectiveness, accountability and decision-making. This interactive workshop provides an easy-to-follow, step-by-step strategic planning process that can be used by any nonprofit. Executive directors and board members will learn the key steps and methodology for building a successful strategic plan. Participants will learn how to evaluate the external and internal environment of an organization as well as the fundamentals of developing mission statements, setting goals and measurable objectives and identifying activities to be implemented. The workshop provides the basic tools necessary to implement a useful evaluation process that assesses organizational capacity and creates procedures for evaluating strategic outcomes, and sets the groundwork for continued in-depth study of these processes in the Advanced Strategic Planning workshop.

Learning Objectives

At the end of the workshop, participants will be able to:

- list the benefits of strategic planning
- identify the key elements of a well-written strategic plan
- effectively revisit and revise the organization's mission and vision if applicable
analyze the internal and external environment while recognizing strengths, weaknesses, opportunities and threats related to their organization
- identify the best practices for evaluation and implementation of the plan
- create an action plan for moving forward with the strategic planning process (a workshop activity)

Creating and Implementing Your Strategic Plan (Advanced Strategic Planning)

Strategic planning remains one of the most effective tools for shaping an organization. This is accomplished through the clarification of fundamental decisions and actions and the alignment of these decisions with the vision of its leaders. This comprehensive workshop builds on the fundamentals of developing a strategic plan that were presented in Strategic Planning I, and expands into the critical areas of plan execution and analysis. Equipped with the knowledge of strategic plan formulation, nonprofit executive directors and board members will learn how to execute and monitor their plans based on proven analytical techniques and models, and how best to engage staff in the process. This practice-driven workshop will use interactive exercises and case studies for learning how to write organizational goals supported by S.M.A.R.T. objectives (**S**pecific, **M**easurable, **A**chievable, **R**esults-oriented, and **T**ime-bound) and action plans. Participants will be introduced to different process options such as Appreciative Inquiry and Scenario Planning.

Learning Objectives

At the end of the workshop, participants will be able to:

- formulate goals and measurable objectives specific to their organization
- establish 1-2 strategies for accomplishing determined objectives
- establish strategic planning, monitoring and controlling mechanisms that ensure positive results
- identify the best methods for engaging board and staff in the strategic planning process
- determine how to integrate different process options into an overall planning methodology

Succession Planning Best Practices

Planning for executive director transition or "succession planning" is an ongoing part of organizational development and sustainability in nonprofit organizations, but it is often not a top priority for nonprofit leaders. Succession planning is used to build strong leadership, assess current operations, prescribe activities for improving operations and sets the stage for a strong transition. To ensure effective succession planning, the partnership between the executive director and the board must be built on trust. In addition, nonprofit executives must be willing to share authority and assign leadership roles to various staff otherwise the executive director's departure could cause the organization to breakdown. Participants learn the importance of succession planning, key elements and how succession planning aligns with their organization's current strategic issues. Participants will review succession readiness checklist and determine the proper steps for developing a succession policy for their own organization.

Learning Objectives

At the end of the workshop, participants will be able to:

- identify the key elements of succession planning and the importance of succession planning
- cite best strategies to improve internal structure and staffing and best practices/strategies for increasing board engagement and ownership will be determined
- identify the key elements of a succession policy

Hop Aboard the Crowdfunding Bandwagon

Crowdfunding has become a popular and innovative fundraising strategy to raise more money from new and existing donors within a short period of time. Is crowdfunding right for *your* organization? This session will outline key strategies for running a successful crowdfunding campaign for your organization. By using a crowdfunding platform, your nonprofit has the opportunity to tell your story to a broader audience and seek donations from individual donors.

Weigh the costs and benefits to determine if this new and exciting way to engage past and potential donors is for your organization.

Learning Objectives

At the end of the session, participants will learn:

- the basics of crowdfunding and how to prepare for a successful campaign
- how to select the appropriate project and crowdfunding platform
- how to create a crowdfunding page to launch a campaign
- the techniques for marketing your campaign and using social

Sustainable Fundraising

What are the most effective and successful methods of raising money? Discover the nuts and bolts, ideas and activities to ensure sustainable fundraising. This interactive workshop will feature: new trends in giving, effective strategies for cultivating corporate and life-long individual donors, clarify the board's role in fundraising, and provide an outline that can be used to create your fund development plan. Other important topics include creating a case statement, prospect research and fundraising materials.

Learning Objectives

At the end of the session, participants will learn:

- how to identify new trends in giving/philanthropy
- outline the components of strategic fund development plan
- define the board's role in fundraising and help to increase board involvement
- identify innovative fundraising strategies related to individual donor campaigns and and corporate solicitation

Best Practices for Building Collaborative Relationships

Funders are most interested in organizations that leverage resources, collaborate with other groups and build their organizational capacities. Learn the key components to creating successful partnerships and strategies for overcoming challenges you may face in creating them. How do collaborative efforts get started? How does a collaborative partnership plan for action? Participants will learn how to establish a governance structure for leading such a partnership and establishing guidelines for collaborative relationships.

Learning Objectives

At the end of the session, participants will learn:

- key definitions related to collaboration
- benefits of collaboration, relationship building and networking
- tips for successful collaboration
- best practices taken from examples of successful partnerships
- define individual roles in the new partnership to leverage the strengths of each organization