Non Profit News

Temple NEST (Nonprofit Evaluation and Services Training Center)

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TEMPLE UNIVERSITY

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NEST SERVICES:

- **Custom Designed Training**
- **Grant Writing**
- **Strategic Planning**
- **Surveys & Needs Assessments**
- **Program Evaluation**
- **Evidence-Based Practices**
- **Outcomes Measures Design**
- **Database Applications**
- **Statistical Analysis**
- **Board Development**

INSIDE THIS ISSUE:

Issues to Consider in November:

Joining a Board of Directors

Joining the board of directors of a local nonprofit organization is an enriching opportunity enabling you to: (1) assist the mission or the organization by sharing your professional skills and (2) improve your own professional skills. However, before you commit to a board, you should review the following checklist to be certain that it is the right decision for you. Remember, we all should have a personal commitment to give back to our communities, and nonprofit organizations make available good opportunities to use our talents to improve society.

Ask the organization for the following materials and read them prior to joining. Each of these documents is essential and offers good insights into the organization's capacity to function as an effective nonprofit. A reason for reviewing these documents is to understand the current standing of the agency so you are clearly aware of both the financial and programmatic position of the agency. Please be aware that all organizations should have these documents, however; some organizations need your guidance to help them develop the necessary skills and improve.

(1) ***Organizational bylaws*** - The bylaws will describe the mission of the agency and provide information on the operations of the board. For example it will discuss the agencies members, how members elected and the length of their terms, how issues are decided, committee structure, and your responsibilities as a board member. *Action:* You should review the bylaws and make certain you understand both your responsibilities and those of other directors.

(2) ***990 IRS Filing*** – The IRS 990 tax filing describes the current overall financial picture of the organization. It lists assets and liabilities, reviews previous fiscal year income and expenses, identifies board members, addresses conflicts of interests, and provides the internal revenue service with information regarding compliance with U.S. Tax codes. *Action*: familiarize yourself with the organizations assets and liabilities.

(3) **Annual Report** - Although not mandatory, effective organizations produce an annual report that identifies a "snapshot" by briefly highlighting: (1) the programs offered; (2) their impact on the community and outcome data; and (3) a summarized financial report. *Action*: obtain an understanding about the services provided by the organization.

(4) **Audit** – An audit is an independent accounting statement of financial review that examines the internal accounting practices of the organization in relation to best practice standards performed by a certified public accountant. Accountants review compliance with external contracts and governmental requirements. All audits should be completed within 6 months of the most recent fiscal year end. *Action*: Be certain that the organization operates financial activities per acceptable accounting practices.

(5) **Agency Budget** – Organizations should develop and monitor an annual budget that identifies projected income sources and tracks expenditures on a month to month basis. *Action*: Understand the operating revenues and expenditures for the organization including personnel issues, fringe benefits for employees, and general operating costs.

(6) **Strategic Plan** – A strategic plan serves as a guide for organizational direction agreed upon by key stakeholders (e.g., board members). Members should agree upon the direction that they would like the

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From the Director's Desk...

Nearly all indicators suggest that philanthropic giving for 2010 is projected to be flat at best. This is not welcomed news, especially given that the 2009 philanthropy results have been disappointing. Despite record federal spending, 2009/10 state budgets have been reduced resulting in funding cuts for many nonprofit organizations.

Given these economic conditions, nonprofit funders are requesting increased accountability.

Nonprofits need to conduct a good self examination. Yes, it is time for a check-up, time to circle the wagons and assess our mission and explore options to assess effectiveness.

If a governmental funding stream disappears, it really means that outcomes were not achieved and the services are not deemed cost beneficial for our society compared to other initiatives.

Nonprofit agencies that receive external support should constantly strive to demonstrate program outcomes. The onus for this to happen needs to focus on the Nonprofit Board of Directors. Directors need to request program outcomes from administrative staff. An effective board meeting should have a standing report on program outcomes, similar to financial reports. Without good data, it is difficult to assess organizational performance.

Good Evaluation offers opportunities to utilize data for advocacy, organizational planning, and quality program improvement. Program evaluation is not a liability or an additional expenditure, it is an investment. And given these economic times, good investment strategies are hard to find. There is no better investment than understanding the effectiveness of your programs.

Joining a Board of Directors Continued

agency to pursue over the course of a prolonged period (3 to 10 years). _Action_ – Review the plan and understand a sense of direction of the organization.

(7) **Copy of Board of Directors Liability Insurance** – As a prospective board member you should be certain that the organization has appropriate levels of officers and directors liability insurance to protect you in case of unforeseen events (e.g., lawsuits, criminal acts, etc.). As a board member, you are liable for the activities of the organization including those under your employment. _Action_ – Be certain that the insurance is valid.

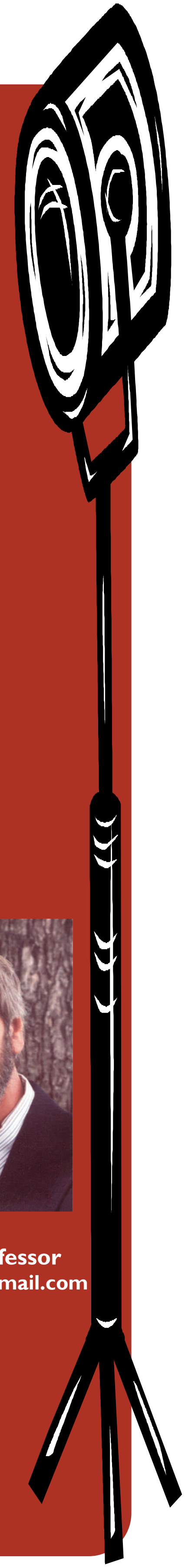
(8) **Policy and Procedures Manual** – Review the organizations policy and procedure manual to be certain that they correspond to IRS requirements, contractual obligations, accreditation and certification bodies, and best practice standards. _Action_ – Familiarize yourself with the policy development process.

(9) **Board Minutes** – Ask for copies of the past year board of director meeting minutes. This will provide a good understanding of actions taken by the board.

Ask for an orientation to the organization. Meet with the board president and board executive committee, schedule time to meet with the executive director or chief executive officer, tour the facility, and talk with others in the community about the agency. Based on this information, you should draw a conclusion if the organization is a good fit for you.

Finally, ask yourself if you are willing to commit your time, talents, and resources to the organization. All board members should expect to contribute at least 2 hours per week to board related activities. Each board member typically serves as a member of at least one subcommittee or workgroup. Each board member should serve as a spokesperson of the agency, so prepare yourself by learning about how the organization operates and understanding the outcomes of the agency. To this end, you must believe in the mission and vision of the agency and understand that the activities implemented are congruent with current practices that achieve best outcomes in a cost-effective manner. It is important to attend board meetings and share your opinions. Effective organizations consider diverse opinions and respect all views. Helping and challenging the organization and questioning the administrative team is an important issue toward achieving accountability, mission and vision. Finally, if you are unable to commit time to an organization as a board member, decline participation and try to assist the organization through volunteer service or resource generation.

Remember, the nonprofit sector relies on volunteers to guide and direct the organization. Your contributions will improve our society and your community. Please contribute your time and you will be pleasantly surprised with the rewards that you derive from active participation.



Spotlight on Research:

Are Public Service Nonprofit Boards Meeting their Responsibilities?

Herman, R.D., (2009). Are public service nonprofit boards meeting their responsibilities? *Public Administration Review*, *69*(3), 387-390.

Most often, nonprofits are evaluated on the services they provide to the community. Rarely does anyone evaluate the performance of an organization's Board of Directors. Yet, the Board is the key to any nonprofit agency's sustainability and success in achieving its mission through the most fiscally sound and ethical management principles.

A study by Francie Ostrower, as reviewed by Herman (2009), collected data from the largest random sample of U.S public benefit nonprofit boards (n=5,115). Her report examined two broad nonprofit board issues: the extent to which Boards meet certain accountability standards and performance criteria.

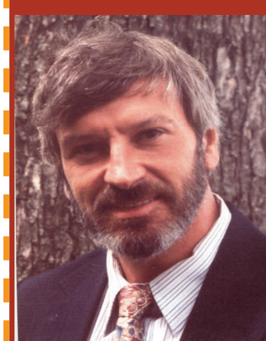
In terms of accountability, Ostrower's study finds that larger boards are better at accepting certain Sarbanes-Oxley accountability standards like having an audit committee, conducting an independent audit, having a conflict-of-interest policy, and having a whistle-blower policy), even though current recommendations are purporting smaller boards.

The study also found that lack of diversity among board members led to fewer accountability standards in the organization, suggesting that board and organizations who put forth a concerted effort for building a diverse board may also put forth more effort in other policy areas and standards. This is a question to be answered by future research.

Ostrower's study looked at several board roles which can be used as performance benchmarks including fundraising, financial oversight, evaluation of the chief executive, planning, policy making, program monitoring, community relations, public advocacy, performance review and management. According to chief nonprofit executives, boards perform most poorly in fundraising (51% poor or fair), public advocacy (46% poor or fair) and community relations (36% poor or fair) (Herman, 2009).

Many organizations struggle with board recruitment and finding new members who are willing to serve and have the skills necessary to effectively guide a nonprofit organization. 41% of the board members in Ostrower's study were 50-65 years of age and 37% were ages 36-50. As these board members fulfill their board terms and rotate off the boards, the need for training potential new board members on issues of accountability and performance becomes a critical task for a nonprofit organization. The findings of this study suggest that nonprofits are currently not effective in executing their responsibilities and that not much has been done to develop best practices to orient and train new board members.

It is therefore the responsibility of every new and current board member to understand his or her individual and collective role on a board. Current board members and agency executives need to investigate and instigate research on best practices in board performance. For many nonprofits, this is a key to sustainability and survival.



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RFP Announcements & Funding Opportunities

Behavioral and Integrative Treatment Development Program (R34) NIH

Opening date: January 16, 2010

http://grants.nih.gov/grants/guide/pa-files/PA-10-013.html

The purpose of this R34 Funding Opportunity Announcement (FOA) is to advance evidence-based treatment research through 1) the development, manualization, standardization, early-stage efficacy and/or pilot testing of novel or adapted treatments and/or interventions (i.e. Stage 1 treatment research, see below), 2) the refinement, modification, adaptation and/or pilot testing of interventions with demonstrated efficacy for use in broader scale efficacy or effectiveness trials, or 3) novel treatment research that requires preliminary testing or development. It is expected that research conducted via this R34 mechanism will primarily consist of Stage I treatment development research that will provide feasibility, tolerability, and acceptability information and/or pilot data for larger scale Stage II or Stage III behavioral and integrative treatment studies. This FOA seeks to support research, as described above, within the domains of behavioral, combined, sequential, or integrated behavioral and pharmacological (1) drug abuse treatment interventions, including interventions for patients with comorbidities, in diverse settings; (2) interventions to prevent the acquisition or transmission of HIV infection among individuals in drug abuse treatment; (3) interventions to promote adherence to drug abuse treatment, HIV and addiction medications; and (4) interventions to treat chronic pain.

Consulting Firm Offers Grants for Forward-Thinking Nonprofit Organizations

Deadline: November 15, 2009

http://achieveguidance.com/news/consulting-firm-offers-grants-for-forward-thinking-nonprofits

Achieve, an Indianapolis-based consulting firm serving the needs of nonprofit organizations with new and emerging fundraising programs, invites nonprofit organizations to apply for the firm's services grant.

Achieve will provide a year of services free of charge to two organizations selected through an application process. Two grants are available for 2010: one for Achieve coaching services (ten hours of time valued at $2,000), and one for one year of Achieve consulting service (value to be determined by scope of series, up to $12,000). Grant recipients will also receive access to the Achieve client Web site containing an online resource library of more than 150 templates and guidance pieces; twelve webinar sessions; the Achieve It! Project and goal-setting tool and a subscription to Achieve monthly newsletter.

Any nonprofit organization with 501(c)((3) status that has been in operation at least two years is eligible to apply. Grantees will be selected based on the organization's level of need and stage of organizational development, as described in the organization's proposal. Application guidelines are available at the Achieve website.

Home Depot Accepting Applications for Building Healthy Communities Grant Program

Deadline: December 15, 2009

http://corporate.homedepot.com/wps/portal/Grants

The **Home Depot's** Building Healthy Communities Grant Program awards grants of up to $2,500 to nonprofit 501(c)(3) organizations, public schools and tax-exempt public service agencies in the United States that are using the power of volunteers to improve the physical health of their community. Grants are made in the form of Home Depot gift cards for the purchase of tools or materials.

Grants are for community improvement projects that include activities such as construction or refurbishment of affordable or transitional housing; building, rebuilding, painting, refurbishing, and/ or improving energy efficiency and sustainability; and landscaping, planting of native trees, community facility improvements, and the development and/ or improvement of green spaces. Grants must support worl completed by community volunteers in the US.

All applicants are required to pass an eligibility quiz before being considered for a grant. Visit the Home Depot website for complete program information and eligibility quiz.

Calls for Abstracts, Proposals & Papers

Call for Proposals: Health Impact Project

Deadline: Open

http://www.healthimpactproject.org/

The Health Impact Project, a collaboration of the Robert Wood Johnson Foundation and The Pew Charitable Trusts, encourages the use of the health impact assessment (HIA) approach to identify the health consequences of public policies, programs and projects, and help decision-makers make better-informed choices that avoid unintended harm and unexpected costs. We are issuing this call for proposals to demonstrate the effectiveness of HIAs and promote their incorporation into local, state, tribal and federal decision-making. November 5, 2009 (1:30 p.m. ET)-Web conference call for interested applicants. Registration is required. Please visit project website for details.

Call for Proposals: Association for the Advancement of Social Work with Groups (AASWG)

June 3-6, 2010

Deadline: December 11, 2009

http://www.aaswg.org/

STRENGTHENING SOCIAL SOLIDARITY THROUGH GROUP WORK: RESEARCH AND CREATIVE PRACTICES

AASWG is pleased to invite submissions of proposals for presentations at its 32nd Symposium, to be held in Montréal, Québec, Canada. Social workers, group workers, researchers, teachers, supervisors, managers, students, and group members are invited to share their experiences, trade ideas, and discuss questions on this year's theme, Strengthening Social Solidarity through Group Work: Research and Creative Practices. Since the very beginning, groups in social work have been known for their creativity, a key factor in their development, expansion, and recognition. In the current context, with the recession undermining social connections, social problems becoming increasingly complex and administrative considerations playing a greater role in determining practices, it is important that we all pull together to ensure that social solidarity remains a strong force in communities. Innovations in group social work research and practice will therefore be central to the Symposium. Presentations may address any of the following topics:

- Creative intervention and research process
- Appropriateness and contributions of group work in the recession
- Creative potential of technologies for practice and research
- Alliance and reciprocity in research and practice
- Ethical and organizational issues in group work
- Innovations in teaching, supervision, and professional development
- Using small groups to work on environmental change, sustainable development, community revitalization, and social and professional integration
- Group practice that has made a difference

Best Practice Strategy for Nonprofits

OMB Increases Emphasis on Evaluation

On October 7, 2009, the Director of the Office of Management and Budget (OMB) issued a *MEMORANDUM FOR THE HEADS OF EXECUTIVE DEPARTMENTS AND AGENCIES* calling for an "Increased Emphasis on Program Evaluation." OMB will launch government-wide efforts as part of the Fiscal Year 2011 Budget process. These efforts will (a) make information available online about all Federal evaluations focused on program impacts, (b) establish a new inter-agency working group to promote stronger evaluation across the Federal government, and (c) allocate funding for agencies seeking to improve or strengthen their capacity to conduct impact evaluations. The initiative will focus on social, educational, economic, and similar programs aimed at life outcomes for individuals; i.e., mostly the social and human services areas.

While the OMB initiative is aimed at Federal Departments and Agencies, the fact that the majority of funding for the non-profit sector comes from these sources augurs that evaluation will become even more important in successful seeking of grant awards. One of the primary strategies of the Temple NEST is to collaborate with nonprofit agencies to develop evaluation plans for proposed projects and then serve as an independent evaluator to carry out those evaluations. The full text of the OMB memorandum can be accessed at:

http://www.whitehouse.gov/omb/assets/memoranda_2010/m10-01.pdf

Temple NEST will host a workshop on program evaluation on November 17, 2009 from 9:00 AM - 12:00 PM. This course is a primer on how to evaluate a specific program within a non-profit agency. Participants will:

- Construct a logic model for the program
- Understand how to perform a process and formative evaluation
- Learn how to perform an outcomes evaluation
- How to perform a cost analysis of the program
- Learn how to communicate program outcomes to various target audiences for program sustainability.

The workshop cost is $25 per participant and limited to the first 25 registrations. To register, call (866) 769-1860.

NEST

Upcoming NEST Events

November 2009

Sun	Mo	Tue	We	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

December 2009

Sun	Mo	Tue	We	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

January 2010

Sun	Mo	Tue	We	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

November 17: **Program Evaluation**
9:00 AM - 12:00 PM
Temple University Harrisburg

Coming in 2010:

February 9, 2009: **Essentials for a Nonprofit Website**
9:00 AM - 12:00 PM
Temple University Harrisburg

March 16, 2010: **Board Development Workshop**
9:00 AM - 12:00 PM

January 19, 26 and February 2, 2010: **Advanced Grant Writing Workshop Series**
9:00 AM - 12:00 PM
Temple University Harrisburg