

Class Outline- Establishing Your Organization / Obtaining a 501 (c)(3) Exemption Status

Time	Who	Topic	Type of Activity
9:30 – 9:45	Agency Instructor & Lead Instructor	<ul style="list-style-type: none"> • Introductions • Overview of instruction 	<ul style="list-style-type: none"> • Presentation and Overview of Model
9:45-10:00	Lead Instructor	<ul style="list-style-type: none"> • Review Objectives, Agenda and Introductions 	<ul style="list-style-type: none"> • Presentation
10:00 –10:15	Lead Instructor	<ul style="list-style-type: none"> • Overview 12 steps 	<ul style="list-style-type: none"> • Presentation
10:15-10:50	Lead Instructor	<ul style="list-style-type: none"> • Step 1: Identify and assess community needs 	<ul style="list-style-type: none"> • Presentation • Activity
10:50- 10:55	Lead Instructor	<ul style="list-style-type: none"> • Step 2: Identify and evaluate Available Resources 	<ul style="list-style-type: none"> • Presentation • Activity
10:55–11:05	Lead Instructor	<ul style="list-style-type: none"> • Step 3: Identify and examine the basis for tax exemption 	<ul style="list-style-type: none"> • Presentation <ul style="list-style-type: none"> • Case Study
11:05-11:15	Break	<ul style="list-style-type: none"> • Break 	<ul style="list-style-type: none"> • Break
11:15-11:45	Lead Instructor	<ul style="list-style-type: none"> • Step 4: Develop Core Values, then Mission Statement 	<ul style="list-style-type: none"> • Presentation • Activity
11:45-11:50	Lead Instructor	<ul style="list-style-type: none"> • Step 5: Choosing the legal Organizational Structure 	<ul style="list-style-type: none"> • Presentation
11:50-12:35	Lead Instructor	<ul style="list-style-type: none"> • Step 6: Establishing a Nonprofit Corporation 	<ul style="list-style-type: none"> • Presentation
12:35-1:00	Lunch	<ul style="list-style-type: none"> • Lunch 	<ul style="list-style-type: none"> • Lunch
1:00-1:45	Lead Instructor	<ul style="list-style-type: none"> • Step 7: Obtaining Tax-Exempt Status 	<ul style="list-style-type: none"> • Presentation • Handouts • Activity
1:45 – 2:00	Lead Instructor	<ul style="list-style-type: none"> • Step 8: Establishing and Developing the Board of Directors 	<ul style="list-style-type: none"> • Presentation
2:00-2:15	Break	<ul style="list-style-type: none"> • Break 	<ul style="list-style-type: none"> • Break
2:15 – 2:30	Lead Instructor	<ul style="list-style-type: none"> • Step 9: Staffing the Organization and Operational Manual 	<ul style="list-style-type: none"> • Presentation
2:30 – 2:45	Lead Instructor	<ul style="list-style-type: none"> • Step 10: Identifying Available Sources of Financial Support 	<ul style="list-style-type: none"> • Presentation
2:45-2:55	Lead Instructor	<ul style="list-style-type: none"> • Step 11: Complete the Board Development and Strategic Plan 	<ul style="list-style-type: none"> • Presentation
2:55-3:00	Lead Instructor	<ul style="list-style-type: none"> • Step 12: Go Provide Your Services! 	<ul style="list-style-type: none"> • Presentation
3:00-3:15	Lead Instructor	<ul style="list-style-type: none"> • Resources Critique and next steps 	<ul style="list-style-type: none"> • Evaluation

Class Outline- Board Development

Time	Who	Topic	Type of Activity
9:00 – 9:15	Agency Instructor & Lead Instructor	<ul style="list-style-type: none"> • Introductions • Overview of instruction 	<ul style="list-style-type: none"> • Instructor and participant introductions • Presentation and Overview of Model
9:15 - 9:45	Lead Instructor	<ul style="list-style-type: none"> • What is a board? • Legal definition, articles, bylaws and statutory agent. 	<ul style="list-style-type: none"> • Presentation • Handouts
9:45- 10:15	Lead Instructor	Financial Oversight <ul style="list-style-type: none"> • What role does the board play 	<ul style="list-style-type: none"> • Presentation
10:15- 10:30	Break		
10:30 – 11:00	Lead Instructor	<ul style="list-style-type: none"> • Legal Risks and Responsibilities • 501(c) 3 	<ul style="list-style-type: none"> • Presentation • Handout
11:00 – 11:30	Lead Instructor	<ul style="list-style-type: none"> • Roles and Responsibilities • Board Structure <ul style="list-style-type: none"> • Committees • Officers 	<ul style="list-style-type: none"> • Presentation
11:30- 12:30	Lunch Break		
12:30- 1:15	Lead Instructor	<ul style="list-style-type: none"> • Types of Boards • Building a Board 	<ul style="list-style-type: none"> • Presentation • Handout • Activity
1:15- 1:45	Lead Instructor	<ul style="list-style-type: none"> • Board Cycle <ul style="list-style-type: none"> • Recruitment, Retention, Evaluation 	<ul style="list-style-type: none"> • Presentation
1:45- 2:30	Lead Instructor	<ul style="list-style-type: none"> • Assessing your Board • Self assessment of participants' boards 	<ul style="list-style-type: none"> • Self assessment filled out and shared with group.
2:30- 2:45	Lead Instructor	<ul style="list-style-type: none"> • Managing Effective Meetings 	<ul style="list-style-type: none"> • Presentation
2:45- 3:00	Lead Instructor	Conclusion <ul style="list-style-type: none"> • Complete action planning • Evaluation 	<ul style="list-style-type: none"> • Evaluation forms completed • Evaluation discussion

Outcomes for Non-Profit and Faith-Based Organizations

Time	Who	Topic	Type of Activity
9:00 – 9:30	Agency Instructor & Lead Instructor	<ul style="list-style-type: none"> • Introductions <ul style="list-style-type: none"> • Ice Breaker Activity • Overview of Agenda • Housekeeping 	<ul style="list-style-type: none"> • Ice Breaker Activity • Agenda and time • Bathrooms, baskets, breaks and lunch
9:30 - 10:00	Lead Instructor	Benefits of Outcomes <ul style="list-style-type: none"> • History of Outcome Measurement and Non-profit organizations • Examples of Outcomes in social service 	<ul style="list-style-type: none"> • Interactive Presentation
10:00 – 10:30	Lead Instructor	Who's the customer? <ul style="list-style-type: none"> • Internal vs. External Customers • Outcomes for each 	<ul style="list-style-type: none"> • Interactive Presentation • Small Group Activity
10:30-10:45	Break		
10:45-12:00	Lead Instructor	Outcome Framework as a Management Tool (Part I) <ul style="list-style-type: none"> • Definition and Examples of each part of the framework • Customer Frameworks 	<ul style="list-style-type: none"> • Presentation • Examples • Activity
12:00-12:45	Lunch		
12:45-2:15	Lead Instructor	Outcome Framework as a Management Tool (Part II) <ul style="list-style-type: none"> • Agency Frameworks • Collaboration Frameworks 	<ul style="list-style-type: none"> • Presentation • Examples • Activity
2:15- 2:30	Break		
2:30- 3:30	Lead Instructor	Strategies for Implementing Change <ul style="list-style-type: none"> • Culture of Change • 20-30-50 Rule • Barriers to Change 	<ul style="list-style-type: none"> • Presentation • Examples • Activity
3:30-3:45	Lead Instructor and Agency Instructor	Wrap-up <ul style="list-style-type: none"> • Q & A • Evaluation • Upcoming Events 	<ul style="list-style-type: none"> • Presentation • Discussion • Evaluation Completed

Class Outline — Human Resource and Volunteer Management

Time	Who	Topic	Type of Activity
9:00 – 9:10	Agency Instructor & Lead Instructor	<ul style="list-style-type: none"> • Introductions • Housekeeping • Objectives 	<ul style="list-style-type: none"> • Facilitator Intro
9:10-9:25	Lead Instructor	<ul style="list-style-type: none"> • Review HR Check List 	<ul style="list-style-type: none"> • HR Checklist
9:25–10:00	Lead Instructor	Presentation of Employment Laws <ul style="list-style-type: none"> • Brief review • Required Postings 	<ul style="list-style-type: none"> • Offer Website to get posters from
10:00-10:45	Lead Instructor	Recruiting and Retention <ul style="list-style-type: none"> • Recruitment strategies • Interviewing Skills • Discrimination pre and post employment • Pre-employment Screening 	<ul style="list-style-type: none"> • Presentation • Exercise
10:45-10:55	Break		
10:55-11:15	Lead Instructor	Orientation & Training <ul style="list-style-type: none"> • Recommended policies for orientation • Personnel Policies-what to consider for your manual • Sample Policies • Training – new and existing staff • Controlling Turnover 	<ul style="list-style-type: none"> • Presentation • Exercise
11:15- 11:30	Lead Instructor	Compensation and Benefits	<ul style="list-style-type: none"> • Presentation
11:30– 12:00	Lead Instructor	Termination Q &A regarding Human Resources	<ul style="list-style-type: none"> • Presentation
12:00-12:45	Break	Lunch and Networking	
12:45-1:45	Lead Instructor	Objectives Volunteer Checklist Preparing for the Volunteer Recruiting for Success	<ul style="list-style-type: none"> • Review Class Objectives • Complete Volunteer Checklist • Volunteer Job Dis. Exercise • Presentation
1:45-2:30	Lead Instructor	Application and Background Checks Orientation and Training Recognition	<ul style="list-style-type: none"> • Presentation
2:30-2:40	Break		
2:40– 3:30	Lead Instructor	Conclusion <ul style="list-style-type: none"> • Complete action planning • Class Evaluation 	<ul style="list-style-type: none"> • Action Plan • Q&A • Evaluation discussion

Class Outline- Financial Management

Time	Who	Topic	Type of Activity
9:00 - 9:15	Agency Instructor & Lead Instructor	<ul style="list-style-type: none"> • Introductions • Overview of instruction • Pre-test 	<ul style="list-style-type: none"> • Presentation and Overview of Model • Participants take pre-test
9:15 -9:30	Lead Instructor	<ul style="list-style-type: none"> • Why Do Financial Management 	<ul style="list-style-type: none"> • Presentation • Handouts
9:30 -10:15	Lead Instructor	<ul style="list-style-type: none"> • Building Financial Management Systems <ul style="list-style-type: none"> • Basic Financial Statements • Building the Budget • Forecasting Expenses • Forecasting Income/Revenue • Managing Cash Flow 	<ul style="list-style-type: none"> • Presentation • Handouts • Templates
10:15-10:30	Break		
10:30-11:15	Lead Instructor	<ul style="list-style-type: none"> • Cash Flow Management Case Study 	<ul style="list-style-type: none"> • Small Group Work
11:15-12:00	Lead Instructor	<ul style="list-style-type: none"> • Financial Responsibility and Accountability <ul style="list-style-type: none"> • Who • Why • How 	<ul style="list-style-type: none"> • Presentation • Handouts • Templates
12:00-1:00	Lunch Break		
1:00-1:30	Lead Instructor	<ul style="list-style-type: none"> • Policies and Procedures - <ul style="list-style-type: none"> • The Need for Documentation • What Kind of Documentation • Making the Financial Transparent 	<ul style="list-style-type: none"> • Presentation • Handouts • Templates
1:30 - 2:00	Lead Instructor	<ul style="list-style-type: none"> • Public Accountability and Reporting <ul style="list-style-type: none"> • Audits vs Reviews • IRS Form 990 • Other Disclosures 	<ul style="list-style-type: none"> • Presentation • Handouts • Templates
2:00 - 2:30	Lead Instructor	<ul style="list-style-type: none"> • Next Steps • Building Organization Improvement to Do List 	<ul style="list-style-type: none"> • Handouts • Case Study
2:30 - 2:45	Lead Instructor	<ul style="list-style-type: none"> • Additional Resources and Available Assistance 	<ul style="list-style-type: none"> • Handouts
2:45 - 3:00	Lead Instructor	<ul style="list-style-type: none"> • Closing Comments & Evaluation 	<ul style="list-style-type: none"> • Evaluation

Class Outline Fundraising

Time	Who	Topic	Type of Activity
9:30 – 9:45	Coordinator & Lead Instructor	<ul style="list-style-type: none"> • Introductions • Overview of training and schedule • Ice-Breaker 	<ul style="list-style-type: none"> • Ice-Breaker
9:45 - 10:15	Lead Instructor	<ul style="list-style-type: none"> • Successful Fundraising (overview) <ul style="list-style-type: none"> • The need for a case statement • Grants • Individuals • Events 	<ul style="list-style-type: none"> • Presentation
10:15- 11:00	Coordinator & Lead Instructor	<ul style="list-style-type: none"> • Developing a Case Statement <ul style="list-style-type: none"> • Mission and Vision • Goals and Impact • Telling the story 	<ul style="list-style-type: none"> • Small Group work • Case Statement Preparation
11:00- 11:15	Break		
11:15- 12:00	Lead Instructor	<ul style="list-style-type: none"> • Reaching Individual Donors 	<ul style="list-style-type: none"> • Presentation • Role-plays
12:00- 12:30	Lead Instructor	<ul style="list-style-type: none"> • Event Fundraising 	<ul style="list-style-type: none"> • Presentation
12:30- 1:15		<ul style="list-style-type: none"> • Lunch 	
1:15- 2:00	Lead Instructor	<ul style="list-style-type: none"> • Grants and Proposal Development 	<ul style="list-style-type: none"> • Presentation
2:00- 2:15	Break		
2:15- 2:45	Coordinator & Lead Instructor	<ul style="list-style-type: none"> • Developing a fundraising plan for your organization 	<ul style="list-style-type: none"> • Presentation • Small-group
2:45- 3:15	Lead Instructor	<ul style="list-style-type: none"> • Locating Resources <ul style="list-style-type: none"> • Web-based searches • Resources in your community 	<ul style="list-style-type: none"> • Presentation
3:15- 3:30	Coordinator	<ul style="list-style-type: none"> • Conclusion <ul style="list-style-type: none"> • Questions • Evaluation 	<ul style="list-style-type: none"> • Evaluation completion

Class Outline Grant Writing

Time	Who	Topic	Type of Activity
9:00 – 9:30	Coordinator	<ul style="list-style-type: none"> • Arrival and Registration 	<ul style="list-style-type: none"> • Networking
9:30 - 9:50	Coordinator & Lead Instructor	<ul style="list-style-type: none"> • Introductions • Review Objectives and Agenda 	<ul style="list-style-type: none"> • Ice-breaker
9:50 - 10:20	Lead Instructor	<ul style="list-style-type: none"> • Compiling Organization Information • Compiling Program Information 	<ul style="list-style-type: none"> • Presentation • Handout
10:20- 10:30	Lead Instructor	<ul style="list-style-type: none"> • Potential Funder Overview 	<ul style="list-style-type: none"> • Presentation
10:30 - 10:40	Lead Instructor	<ul style="list-style-type: none"> • Prospect Identification and Initial Evaluation 	<ul style="list-style-type: none"> • Presentation
10:40	Lead Instructor	<ul style="list-style-type: none"> • Activity one – Prospect Evaluation 	<ul style="list-style-type: none"> • Small-Group
11:00	Break		
11:15- 11:25	Lead Instructor	<ul style="list-style-type: none"> • Prospect Evaluation Continued 	<ul style="list-style-type: none"> • Presentation
11:25- 11:45	Lead Instructor	<ul style="list-style-type: none"> • Tracking and Managing the Process/Grant Summary Report 	<ul style="list-style-type: none"> • Presentation • Handout
11:45 – 12:20	Lead Instructor	<ul style="list-style-type: none"> • Developing The Outline • Activity Two- Outline Development 	<ul style="list-style-type: none"> • Presentation • Small-group
12:20	Lunch		
1:00- 2:00	Lead Instructor	<ul style="list-style-type: none"> • Draft Narrative 	<ul style="list-style-type: none"> • Presentation • Handout
2:00 – 2:30	Lead Instructor	<ul style="list-style-type: none"> • Evaluation and Editing • Budgeting Basics 	<ul style="list-style-type: none"> • Presentation
2:30 – 2:50	Lead Instructor	<ul style="list-style-type: none"> • Post-Proposal Steps 	<ul style="list-style-type: none"> • Presentation
2:50- 3:00	Lead Instructor	<ul style="list-style-type: none"> • Capacity Building Grant Ideas/Action Steps 	<ul style="list-style-type: none"> • Presentation
3:00	Coordinator	<ul style="list-style-type: none"> • Conclusion and Evaluations 	<ul style="list-style-type: none"> • Evaluation completion