

# NONPROFIT CAPACITY BUILDING TRAINING

## CAPACITY BUILDING PROGRAM IN BRIEF

Date	Event
Sept 6, 2019	Application award announcements
Oct 8-10, 2019	Workshop #1: Systems Thinking and Root Cause Analysis
Week of Oct 21, 2019	Site Visits with Imperial County Nonprofits
Nov 19-21, 2019	Workshop #2: Organizational Sustainability
Dec 17-18, 2019	Online Class Meetings
Jan 14-16, 2020	Workshop #3: Organizational Communications
Week of Mar 2, 2020	Site Visits with Imperial County Nonprofits
April 6, 2020	Draft Education, Outreach and Marketing Material due
May 4, 2020	Final Education, Outreach and Marketing Material due
May to June 2020	Participant interview with EFCWest staff
June 8, 2020	Presentations to Local Health Authority

## CAPACITY BUILDING PROGRAM IN DETAIL

Nonprofit organizations play a key role in improving wellness in communities. Through this training, the Local Health Authority will work to engage nonprofits to improve their abilities in the following areas: systems thinking and root cause analysis; organizational capacity; and organizational communications.

### OVERVIEW 2019

Two, three-day workshops will be held in October and November 2019. Classes will occur from 9am-4pm on all workshop days. The workshops will be supplemented by at least one coaching call with each nonprofit in between workshops. Site visits will occur during the week of October 21 so that trainers can meet one-on-one with each nonprofit and gain a better understanding of the operations and management of the organizations to better address various nonprofits' needs throughout the remainder of the program. Two online class meetings will take place on December 17<sup>th</sup> and 18<sup>th</sup> with the whole cohort will be held (topics to be determined).

2020

The final, three-day workshop will be held the week of January 13, 2020. Class will, again, occur from 9am-4pm on all workshop days. After completion of the workshop portion of the program, each nonprofit will have a final assignment to produce Education, Outreach and Marketing (EO&M) materials, which will be due May 4, 2020. EFCWest trainers will schedule a second site visit with nonprofits in February or March 2020 to assist with the development of the EO&M materials. Nonprofits will present their EO&Ms to the to the Local Health Authority in June 2020 to complete the program.

#### WORKSHOP #1: SYSTEMS THINKING & ROOT CAUSE ANALYSIS (OCTOBER 8-10, 2019)

At its core, systems thinking is all about looking at the big or holistic picture before we make decisions. For example, even something as simple as getting a pothole fixed can be a systemic issue. How a City makes decisions is often based on financial, political, social, environmental, legal and even technical limitations and considerations. Thus, our pothole may or may not get fixed based on the money in the budget, the political will to spend that money on a pothole vs something more favorable to voters, social pressures from constituents to use money for their own priorities, and so on. As a result, if we want to get the pothole filled, we may need to take a system-wide look at what forces are working for or against the problem and how we might be able to influence those forces.

Health issues are far more complicated than a pothole. Asthma, obesity and other health and social problems are complex and require a holistic approach to understand the underlying causes that can lead to effective actions to reduce the problem. For example, staying indoors on a day with poor air quality may not help a resident with asthma if their home has mold or too much dust. Providing opportunities (parks and gyms) to work out cannot address the motivation, or lack thereof, to exercise and lose weight. In response, this first workshop will introduce the concept of systems thinking and provide the tools and approaches to understand and analyze complex problems. The agenda will include instruction, activities and case studies in the following topics.

- Using Systems Thinking to Better Manage Your Nonprofit
  - Internal: Understanding Your Own Organization through a Holistic/Systemic Lens
  - External: How to Build Your Organization's Role in Imperial County
- Systems and Complexity
  - What is the Difference Between a Simple and Complex Problem? Why Do We Care?
  - Exploring the Imperial County [Community Health Improvement Plan \(CHIP\)](#) from a Systemic Perspective
- Tools and Practices to Address Complexity

- Using Root Cause Analysis for Complex Issues
- Identifying Potential Root Causes of Complex Issues

**Output:** Participants will be expected to identify the root causes of a problem where their organization can have the greatest impact, and then to distinguish at least one new or existing opportunity they can develop or redesign as a potential project.

**Outcomes:** The outcome for Workshop #1 will be a greater understanding of systems thinking and the capacity to 1) better identify potential actions, 2) justify a specific approach to funders and 3) recognize the potential partners necessary to accomplish goals.

#### SITE VISITS WITH IMPERIAL COUNTY NONPROFITS (WEEK OF OCTOBER 21, 2019)

EFCWest trainers will meet with each organization participating in the program to gain a better understanding of their management and operations structures and styles, and any challenges they may be facing. The 1-2 hour long visit should include a tour of facilities and a meeting(s) with the staff leadership including the executive director, if available. Board members are welcome to attend but it is not mandatory.

#### WORKSHOP #2: ORGANIZATIONAL SUSTAINABILITY (NOVEMBER 19-21, 2019)

Identifying an approach to a complex problem is a challenge, but even more vexing is building the capacity to address that problem over the long-term. Securing funding as a means to financial sustainability is one of the greatest challenges any organization faces. Equally important are workforce management and the ability to define organizational outcomes as they impact both the complex issue and the system as a whole. In response, Workshop #2 will be broken into the following three segments.

##### [Session A: Sustainable Fundraising](#)

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This session will focus on the project opportunity identified in Workshop #1 and participants will develop a fundraising plan to support efforts over a three-year period. Training will include basic tips and trends for private foundations and public money (local, state and federal) but also incorporate revenue generating opportunities such as lunches, auctions, services and products for sale. The benefits of coalitions and collaborations will be explored as well as corporate funds.

**Output:** Participants will develop a three-year fundraising plan for their project.

**Outcome:** Participants will learn how to view their fundraising efforts through a systemic lens that includes multiple funders, stakeholders, partners and approaches.

## Session B: Workforce Management

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In this session, participants will analyze their own organizational practices for hiring and retaining their workforce. They will be introduced to a systemic tool that will let them simply assess the six faces of their leadership (engagement, enquiry, enablement, enaction, empathy and ethics) and how each facet does or does not enable employees within their organization. This session will also address the effective use of volunteers, interns and contractors and the legal definitions for all three.

**Output:** Participants will develop a Staffing Plan to retain their current staff and entice new hires.

**Outcome:** Participants will learn to overlay their organizational operations with a systemic approach to break down silos, retain and hire staff, and understand empowering vs disempowering approaches to staff management.

## Session C: Outcomes and Measurement

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Outcome measurement has become one of the most important activities that nonprofits undertake. Outcomes must be measured to:

- Understand the effectiveness of an intervention
- Identify effective practices
- Recognize practices that need improvement
- Prove organizational value to existing and potential funders
- Obtain clarity on purpose and whether or not the organization is achieving its mission and/or vision

This session will help participants define how the project opportunity they identified in Workshop #1 can impact the issue they are trying to address from a systemic perspective.

**Output:** Participants will develop a Data Collection and Measurement Plan that includes how and where to collect their information that will determine the efficacy of their opportunity.

**Outcome:** Participants will learn to identify the necessary data and measurement approaches that will allow them to assess their impact on a complex issue so that they can effectively justify their project to a funder or other decision-maker.

### ONLINE CLASS MEETINGS (DECEMBER 17 AND 18, 2019)

Online class meetings will serve to enhance the learnings from workshops 1 & 2; specific topics will be determined based on needs and interest. Participants will not be attending a regular

workshop session but will be expected to “attend” 1-2 online class meetings which will include education and discussion.

### WORKSHOP #3: ORGANIZATIONAL COMMUNICATIONS (JANUARY 14-16, 2020)

Organizational communications materials are critical to a successful nonprofit. For this Workshop, participants will focus on the following communication elements:

- Understanding the Target Audience
- Building an Organizational Story
- Building the 30-Second Message & Beyond
- Delivering an Effective Presentation

**Output:** Participants will leave this session with organizational outreach material that tells their compelling story, delivers a simple message and conveys their overall impacts and outcomes within Imperial County.

**Outcome:** Workshop #3 will allow participants to better understand and communicate their impacts and outcomes within the larger system of Imperial County. As a result, they are more likely to be able to access funding, build support and develop potent partnerships within the community.

### POST WORKSHOP: DEVELOPING EDUCATION, OUTREACH & MARKETING MATERIAL

While workshop sessions with the whole cohort of trainees will be over, the completion of this training will include a final assignment and site visit from the trainers. Participants will be expected to work internally with their respective organizations to develop Education, Outreach and Marketing (EO&M) material that will support their efforts moving forward. The EO&M material will incorporate the learnings from the three workshop sessions and include the following elements:

- Target Audience (Who are we targeting and why?)
- Our Organizational Story & Message (Why do we do our work?)
- Our Impact on Imperial County (How do we want to fit into County efforts and what data do we have to back up our impact?)
- How We Sustain Our Operations (What is our funding base, who is our great team and how do we sustain them?)
- Our Plan for the Future (Who are we targeting and how will we grow?)

## Post Workshop: One-on-one Visitations (February/March 2020)

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EFCWest trainers will visit each nonprofit organization in February or March 2020 to better understand how the organizations have implemented the workshop learnings and other needs not addressed in the program. EFCWest trainers will also support the development of EO&M materials as necessary.

**Output:** Imperial County nonprofit participants will have completed draft and final EO&M material which will be due on the dates below. Final presentations on the EO&Ms will be given at the June 2020 Local Health Authority meeting.

- Draft EO&M Due: April 6, 2020
- Final EO&M Due: May 4<sup>th</sup>, 2020
- Local Health Authority Presentations: June 8, 2020

**Outcome:** The EO&M material will allow Imperial County nonprofits to effectively compete for funding, partnerships and other opportunities. In addition, the EO&M material can be easily integrated into websites, future funding opportunities and marketing material developed for conferences, meetings, etc.

## REMOTE INTERVIEWS

In May and June 2020, participants will be required to participate in phone interviews with EFCWest instructors to gauge the initial impact from the workshops and learn what worked and what could be improved.