



Getting Good Guidance

Working with a consultant on nonprofit organizational development and capacity building

February 10, 9:00 am - 11:30 am

Getting Good Guidance is a 2.5-hour workshop that will prepare nonprofit leaders to undertake organizational development projects with their staff, board, and outside consultants. Featuring nonprofit leadership, strategy, and governance consultants Andy Fife and Craig Howard, this workshop will provide an overview of common capacity-building topics such as strategic planning, board development, fundraising, strategic communications planning, diversity and equity, succession planning, and more. In the presentation, Fife and Howard will review the standard process for planning and change management, providing examples from other organizations, and defining the roles and responsibilities between staff, board, and consultants. Finally, the workshop will dig into best practices in searching for, hiring, and working with consultants that help with strategy and planning.

Overview and Introductions (10 minutes)

- Overview of grant program and introduce presenters (Claire or other program partner)
- Overview/outline of workshop (Andy & Craig)

Definitions: What is Organizational Development? (10 minutes)

- Basic definition of organizational development and capacity building
- Discussion of why and how organizational development is funded and supported
- Review and define examples and types of organizational development work (from grant program):
 - strategic planning;
 - board development;
 - branding, marketing, and communications;
 - fundraising strategy;
 - strategic growth and scaling;
 - mergers, collaborations, and strategic alliances;
 - diversity, equity, inclusion, and access;
 - executive succession planning; and
 - others (coaching, feasibility studies, facility program planning, etc – not included in funding program)

Process for Org Development (Change Management) (20 minutes)

- Overview
- Preparation: discovery and alignment
- Inquiry: assessment, engagement, and synthesis
- Planning: goals, objectives, and tactics
- Execution: implementing across practices, policy, and culture
- Review: evaluation and communication

Roles and Responsibilities during Org Development (10 minutes)

- Board
- Staff
- Consultants
- Funders and partners
- Community members, donors, and program participants

Case Study Examples (20 minutes)

- Strategic planning example
- Board training and development
- Strategic Communications planning

Working with a Consultant (20 minutes)

- Preparing
- Searching for consultants
- Reviewing prospective consultants
- Contracting and onboarding
- Managing a consultant
- Reviewing and closing out

Questions and Discussion (45 minutes)

The Program: Strategic Consulting for Nonprofit Success (15 minutes)

- About the funding program
- How to apply