

Competencies Map 1.0 Appendices of Projects

There are 76 common projects needed by nonprofit organizations included in the Competencies Map 1.0. Each project includes a description that helps explain what a typical project would include and the goals for that project. The descriptions are intended to provide a general definition; the scope and approach will vary by nonprofit based on their specific needs, and by the companies supporting the pro bono team delivering their expertise. These project types should be used as a starting place for planning and not as hard guidelines.

Communications/Public Relations/Advocacy

Communications Plan

A communications plan outlines a nonprofit's target external audiences, the messages for each and the vehicles used to reach them. It provides a roadmap for how the nonprofit will conduct its communications during a specified time period and the measures for determining its success. The plan is part of an overall marketing effort, and does not include its execution.

Public Relations Plan

A Public Relations plan identifies communications strategies to help an organization achieve its goals and the tactics to achieve them. It can include a broad spectrum of ideas, from developing a specific calendar that establishes an execution time-frame to such tactics as creating media lists, media relations, media training, news releases, speeches, publications, and press kits. (A press kit may be a separate project.) The plan is a part of an overall marketing strategy, and does not include execution.

Advocacy Plan

Nonprofit advocacy is an effort to change the opinion or actions of a specific community. It often targets political decision makers or the voting public. An advocacy plan clearly defines the audience to influence, the desired change and a well-defined process for regularly educating that audience about the organization's point of view via testimony, media outreach, public speaking, op-eds and targeted mailings. It does not include the execution of the plan.

Newsletter Design

An online or print newsletter is a regularly distributed publication produced by a nonprofit to communicate to its stakeholders. It can be produced online or offline. The design is a strategic element that strengthens content and includes the template, a work plan and editorial guide. It may also include developing the first issue of the publication. An online newsletter would include specific technology solutions which must be considered. For print, the design could establish the mechanism for printing and distributing the newsletter.

Annual Report

An annual report is a document (digital and/or print) that describes the nonprofit, summarizes its activities and outcomes from the previous year, and sets forth a vision for the year ahead. It typically includes audited financials (although the audit is not part of the project), financial analysis, description of programs, case studies, program benefits and results, as well as a list of supporters. The project occasionally addresses the necessary printing process.

Brochure

A brochure is a communications document (digital and/or printed) that advertises, promotes or educates targeted audiences about the organization or one of its programs or issues. A brochure project typically includes research to define its objectives and target audience, followed by its design, writing and photography. It occasionally includes help with the printing process.

Public Service Announcement

A public service announcement (PSA) is an advertisement (radio, TV, print, online) that focuses on raising awareness for an issue or nonprofit organization. It can be for any location / medium where advertising is found. This project would develop the strategy and advertising designs for the PSA. This project is unlikely to include securing inventory for the PSA.

Technology Infrastructure

Donor Database Implementation

A donor database implementation project assists a nonprofit in identifying their technology requirements for a Donor Database. Vendors are evaluated and one is selected, and the nonprofit is then assisted in configuring the database to meet their needs, importing their data, and trained on using for going forward. This does not include the purchase of software or hardware. Connectivity between the host would need to be determined.

Organizational IT Plan

An organizational IT plan looks at transitional changes as well as current pain points for an organization to assess how technology can be utilized to support the organization in addressing those needs. It typically includes the plans for utilizing the web, databases (program, fundraising, and operations) as well the core office technology infrastructure like calendaring, networks, phones, software needs, etc. It includes factoring in budgetary constraints of the organization and provides a plan for the organization to budget for technology utilization in the future.

Office Networking

An office networking project requires a team to configure and/or install a networking solution for the organization that does not include purchasing the equipment or managing the relationship with the cable/phone company.

Remote IT Access Set-up

A remote IT access set-up project provides a plan, configuration, and implementation of a system to enable collaboration and communication between sites. The materials required for remote IT access is not included in this engagement. This project is for organizations that have a need for net activity outside of a single site.

Program Database Implementation

A program database implementation project supports an organization in creating a database to track clients and/or client outcomes. It typically starts with a requirements phase where the nonprofit defines how the database would be used and how success would be defined. In the next phase the team either builds a custom database to meet these needs or identifies an appropriate existing vendor. The project may include configuration of the database and integration of existing data. It should also typically include training so that the nonprofit can use it going forward. This does not include the purchase of software or hardware.

Interactive/Website Technology

Online Flash/Video Program Demo

A flash /video demo project can be used by nonprofits to explain the benefits of their program and how it works at events or donor meetings or for training, and is streamed from the organization's web site. This project typically goes through a requirements phase, design phase and then finally a production phase. The demo usually cannot be updated by the nonprofit's staff unless it has the proper skills internally.

Basic Website Design and Development

A basic website project provides a nonprofit with a static website containing up to 15 web pages. The site's content is similar to a brochure or annual report, and explains the organization's mission, programs, goals, accomplishments, and needs. The project includes several phases including research, design and development. In the research phase, the audience, desired actions and necessary messaging are defined. In the design phase, copy, design and photography are created and integrated. The final stage involves converting the design into HTML and training the nonprofit on how to update and maintain the site.

Intranet Design and Development

An intranet project provides a nonprofit with a secure internal web environment for employees, board members and volunteers to access information and interact. It may include contact information, policies, dynamic program and fundraising reports, and an internal calendar. Some versions may include web 2.0 features like wikis, which allows participants to collaborate on creating shared content for the site.

Extranet Design and Development

An extranet project provides a nonprofit with a secure external web environment for clients, alumni and other external stakeholders who regularly need to access information and interact with the organization. It may include blogs, wikis, contact directories, calendars, and libraries of resources. It may also integrate social networking features, or integrate with an organization's intranet.

Interactive Website Development

An interactive web site project provides a nonprofit with a dynamic web site that typically is connected to a content management database and may have some features that require back-end development or the integration of third-party applications like a blog or mapping tool. The project includes several phases including research, design and development. In the research phase, the audience, desired actions and necessary messaging are defined. Then, in the design phase, copy, design and photography are created and integrated. The final stage involves converting the design into HTML and training the nonprofit on how to update and maintain the site.

Fundraising

Event Planning and Production

An event planning and production project supports the management of a nonprofit's major event - typically a fundraising event. It can include event strategy definition, sponsorship and ticket sales, budgeting, collateral material, event volunteer management, securing and managing vendors for the space, speaker recruitment and management and day of fundraising activities like auctions and raffles. For larger events, additional pro bono consultants may be necessary, e.g. multimedia artists to create special displays of the nonprofit's work and/or impact in the community, etc. or interior designers for help with staging and designing the event's aesthetic impact. These considerations should be scoped in detail in the project plan as additional projects.

Fundraising Management Process

A fundraising management process project helps a nonprofit define a process for managing fundraising activities to increase efficiency, effectiveness and predictability. It typically includes the creation of a pipeline management with methodologies for factoring prospects and renewals. It may include a proposed process for streamlining the grant writing and reporting process or individual donor solicitations. It is important in the scope of work to identify the exact processes the project will focus on such as preferred channels of outreach.

Executive Fundraising Coaching

An executive fundraising coaching project matches a fundraising professional with someone who can provide mentorship in any/all aspects of fundraising. It typically leverages knowledge from enterprise sales or from direct mail marketing professionals depending on the fundraising emphasis of the organization.

Donor Segmentation

A donor segmentation project enables a nonprofit to understand who gives to the organization and how they are clustered by behavior and profile. It typically is done based on information from existing donors, but likely will include surveying donors or funder focus groups to gather additional information. It should result in a clear definition of segments with each one including descriptions of demographics, psychographics and typical behaviors. It may also include analysis for ROI per segment relative to cost of soliciting that segment and practical recommendations for executing on the results.

In-Kind Opportunity Assessment

An in-kind opportunity assessment begins with a review of an organization's current and projected expenses and identifies strategies for and specific costs that can be met through in-kind organization sponsorships and in-kind contributions from individuals. For the largest in-kind opportunities it may also include an in-depth analysis of sources and positioning for the asks to increase likelihood of a sponsorship and donation. It will often also include management and financial procedures that will facilitate the organization's receipt of the items and services.

Capital Campaign Design and Management

A capital campaign design and management project devises a plan to reach out to current and potential donors to solicit the funds necessary to achieve these campaign goals. It may include feasibility study, a timeline, a list of roles & responsibilities and associated marketing materials (creation of these materials is a separate project). A pre-requisite for this project type is an existing understanding of the capital needed for a major campaign. Please note capital campaigns can take many years to execute so the scope of this project should be broken down into small projects for each phase of the campaign. Different expertise will be required for each phase.

Capital Campaign Materials

This project identifies the fundraising and marketing objectives and creates the materials necessary to support a capital campaign. Materials may include information for campaign workers and fact sheets as well as pamphlets, brochures, leaflets, and flyers used to advance a campaign.

Human Resources

Assessment and Plan

An assessment and plan project will help a nonprofit understand where they currently are in terms of HR capacity; identify and prioritize which areas of HR the nonprofit can improve for maximum strategic impact and make decisions about where they should dedicate resources to improving HR in the long-term.

Organizational Design

An organizational design project produces an effective organizational structure that addresses key accountability and communications issues, such as responsibility for decisions and outcomes or formal lines of communication that make it easier for employees to get the information they need. An organization design project should result in clear assignments for all strategic and operating goals, mapped outcome responsibilities and decision-making authority for operating areas such as budgets, hiring and firing, and goal-setting, and clarified roles and responsibilities for employees. An organizational design project can touch on very sensitive and potentially politically charged areas of the

nonprofit (e.g. recommendations for eliminating and/or consolidating some positions). A solid understanding of business processes and the nonprofit sector are strongly recommended for this project. A communications strategy and execution plan is a separate project listed under the Human Resources category.

Employee Recruitment Process

An employee recruitment project process helps an organization figure out where to find and how to attract the right employees for key roles. Building a pipeline, writing meaningful job descriptions, creating powerful outreach materials, and clarifying evaluation standards are all a part of solid recruiting. A recruiting project will generally not include defining roles (organizational design) or on-boarding and integrating employees. Some projects might include these deliverables; however, that must be clearly scoped into the project timeline and it should be identified if these deliverables are pre-requisites.

Organizational Diversity Plan

An organizational diversity plan project builds a diversity strategy team and plan to create strategic, long-term change with diversity initiatives. A successful diversity plan integrates diversity as a critical piece of the mission, vision, values, and daily strategy of the organization, and addresses issues such as hiring, firing, clients, budget, compensation, marketing, management styles, strategic planning, recruiting, retention, and investments.

Performance Management

A strong performance management system project will not only increase the effectiveness and satisfaction of your employees, but will also improve your organization's ability to fulfill its mission. At its core, performance management is about three things:

- Clarifying personal objectives and aligning them with organizational objectives
- Providing regular feedback on these personal objectives and development goals
- Learning from past performance in order to continuously improve

Therefore, identifying organizational objectives, organizational culture and core competencies should be considered pre-requisites for this project type.

Back Office Systems Implementation

A back office systems project selects and implements a high quality and cost effective Human Resources management system to manage elements such as payroll, timesheets, benefits, employee information, recruiting and hiring, training, and performance management. This project includes requirements gathering, vendor selection, installation, training, and maintenance plan.

Staff Compensation and Incentive Plan

A staff compensation and incentive plan systematizes compensation and develops non-monetary rewards programs or initiatives. A compensation plan can help an organization recruit and retain qualified employees, boost morale, reward performance in ways that motivate employees, and reduce turnover. The project includes job descriptions and analysis, pay structures, salary administration policies, and total rewards policies. This project can touch on very sensitive and potentially politically charged areas of the nonprofit (e.g. recommendations for eliminating and/or consolidating some positions). A solid understanding of business processes and the nonprofit sector are strongly recommended for this project.

Staff Training & Development Plan

A staff training and development plan project analyzes an organization's current staffing and development needs, and creates a process for creating, implementing, and maintaining organizational and individual development plans. This project helps clients identify the type and level of talent necessary to achieve strategic goals, address top-down and bottom-up development needs, and make good decisions about hiring, training, on-the-job development, and task allocations.

Internal Communications Plan

An internal communications plan ensures that employees receive regular and accurate communications, that messages are consistent across the organization, and that employees understand both the goals and the results of communications. An internal communications plan project might provide an analysis of communications needs, a plan for who needs to issue communications and when, and templates for various communications pieces.

Program Development

Volunteer Management Systems

A volunteer management systems project enables a nonprofit to identify and implement the proper systems for managing its volunteers. The extent to which an organization develops and implements a volunteer management system depends on the nature of the activities to be conducted by the volunteers. For example, an organization that uses many volunteers, some of whom directly serve people, will probably use a very comprehensive system. In contrast, an organization that occasionally uses volunteers to stuff envelopes, might do a brief solicitation to recruit any volunteers that the organization can get and then do a very brief training, afterwards leaving the volunteers alone to perform their task.

Needs from Volunteers Assessment

A needs from volunteers project enables a nonprofit to ensure the organization is making the best use of its volunteer program. Program planning and design begins with an initial assessment of why the organization wishes to utilize volunteers and what the benefits and problems are likely to be of volunteer utilization. While most nonprofits are eager to find volunteer help, they have to be careful when accepting the services volunteers offer. It is in the organization's interest and more beneficial to the people it serves to make certain their volunteers have the skills needed, that the volunteer is truly committed to doing the work, and that their interests match those of the nonprofit. Furthermore, in volunteer work involving children or other at-risk populations, there are legal ramifications for the organization to consider.

Volunteer Needs Assessment

A volunteer needs assessment project enables a nonprofit to consider all of the potential scenarios in which a nonprofit may or may not want to volunteer with the organization.

Program Evaluation

A program evaluation project is a tool a nonprofit organization can use to ensure that its existing programs are serving the mission of the organization and are achieving maximized results. Program evaluation can identify areas of trouble before they become unmanageable. It can also assist in determining how best to allocate resources. This project can be risky because many times the wrong measurements can be chosen or measures are chosen that the organization can't maintain. A high level of sector knowledge is helpful for these projects.

Client Needs Assessment

A client needs assessment project can demonstrate and document a known community need and has the added benefit of involving the public in problem solving and goal setting. Important questions to answer when planning the needs assessment include:

Who is the assessment attempting to inform, influence, or persuade? What purpose is the needs assessment intended to accomplish? Whose needs are to be assessed? What questions need to be asked? Do you already know the answers? Can you do anything to change the situation? How will the information be used? What resources are available to do needs assessments?

Client Service Evaluation

A client service evaluation project should set up the process and tools necessary to evaluate any program outcomes and client satisfaction. All programs should measure impact and identify areas for improvement. This project includes collecting post-project surveys from the delivery team and the client, as well as following up with the client to collect quantitative measurements on the program's long-term impact.

Operations Process Design

An operations process design project details the fundamentals of effective operations management in the areas of program design and evaluation, managing staff and volunteers, team building and communication skills. Following a discussion of the role of program planning within the broader scope of strategic planning, this project will explore the cyclical steps of a program planning process, from initial concept to implementation to evaluation. This project should enable the nonprofit to effectively manage the program planning and evaluation process, increase effectiveness in facilitating productivity among staff and volunteers and fostering creative energy in team efforts.

Strategic Management

Strategic Plan

A strategic planning project enables a nonprofit to envision future goals (typically 3-5 years in the future) and to figure out how it is going to get there. Typically, strategic planning requires stakeholder interviews and other research to take a good look at what is going on outside the organization (including external opportunities and threats); evaluate the organization itself (including strengths and weaknesses); and establish strategic goals. Some strategic plans start by redefining or clarifying the organization's mission, vision, and values; others continue beyond strategic goals and objectives to describe tactics to help reach those goals.

Refined Mission, Vision and/or Values

A mission statement project helps focus energy and resources, clarify purpose, and motivate and inspire employees, volunteers, clients, and funders of a nonprofit. An organization can outgrow its original mission, vision, and values statement, or find that its original statement does not fully communicate its purpose. To rewrite, the organization needs to interview stakeholders, including clients; reflect fully on its role in the community; and draft and review statements until it reaches a powerful, succinct vision.

Environmental and Sustainability Policy and Plan

An environmental and sustainability plan helps an organization assess its current environmental impact, state sustainability goals, and make a plan to achieve those goals. An environmental policy is a unifying vision that guides the actions of an organization's employees, management, shareholders, customers, and suppliers. The project might include stakeholder interviews, assessment of current policies, a feasibility study, a guiding statement, both broad and specific policies, a communications plan, an implementation plan, and a way to evaluate ongoing impact.

Internal Capacity Assessment

An internal capacity assessment project evaluates an organization's capacity in key functions, such as management, fundraising, systems, and human resources. A capacity assessment helps an organization identify where it is strong and where it needs improvement, and can help align staff and board around those needs. Completing a capacity assessment requires selecting a framework, administering self-assessments and outside assessments, summarizing and analyzing findings, and suggesting next steps for improvement. A capacity assessment might also establish means to evaluate growth in the future.

SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats)

A SWOT analysis project lays out an organization's strengths and weaknesses (typically internal factors) as well as threats and opportunities (typically external) in a matrix. Creating a SWOT analysis requires internal and external stakeholder reviews and assessments, as well as facilitated discussions and analysis. Some SWOT projects go beyond analysis to detail next steps and priorities.

"Competitive" Analysis

A competitive analysis project produces a competitive scan of the environment, including organizations in and out of an organization's geography. A scan can evaluate best practices, point in a competitive direction, or highlight opportunities for learning or collaboration, and recommend next steps to address competitive or collaborative growth and change. Typically, a competitive scan includes research and interviews with organizations, funders, clients, and staff, analysis, and recommendations.

Earned Income Business Plan

An earned income business plan provides the data and analysis necessary to plan, fund, and roll out a new business. Typically includes a market and competitive analysis for a particular business opportunity, including a feasibility study that shows where to concentrate efforts; a basic financial model or cost-benefit analysis that projects revenue and impact on the organization; development and presentation of data for fundraising and planning activities; and an operations plan that describes details management needs to launch.

Geographic Expansion Plan

A geographic expansion plan helps an organization plan to replicate existing services in a new location. Typically, an expansion plan project team reviews secondary literature and talks to field experts; reviews competition and collaboration in the new geography; identifies key replication considerations such as potential funding sources and protecting the brand; describes key operational capabilities necessary for success; performs an organizational assessment to evaluate internal capacity for expansion; and makes recommendations for a launch plan and timeline.

Logic Model Design

A logic model design project helps an organization articulate program strategy in a concise, actionable way, and can serve as a unique communications tool to build staff consensus, make stronger pitches to various constituents, or fulfill funders' evaluation needs. A typical logic model project includes development of a logic model that describes the relationships among program resources, activities, and outcomes; a plan for future use, such as evaluation or making operations decisions; and training for board and key staff members. One of the key insights of the logic model is the importance of measuring final outcomes or results, because it is quite possible to waste time and money (inputs), "spin the wheels" on work activities, or produce outputs without achieving desired outcomes. It is these outcomes (impacts, long-term results) that are the only justification for doing the work in the first place. For commercial organizations, outcomes relate to profit. For not-for-profit or governmental organizations, outcomes relate to successful achievement of mission or program goals.

Real Estate & Facilities

Lease Review

A lease review project provides a detailed review of a lease to ensure that the nonprofit is clear on the commitments articulated in the lease. It may also include advice on areas in the lease that might be most advantageous to negotiate.

Facilities Needs Assessment

A facilities needs assessment project helps a nonprofit understand its facilities, office space, or real estate needs. The goal is to assess how nonprofit facilities accommodate their staff, programs, culture, resources, and anticipated growth.

Interior Design & Brand Integration

An interior design and brand integration project helps transform a nonprofit's office and program space to better align with the organization's brand and messaging.

Building Accessibility & Code Compliance

A building accessibility and code compliance project analyzes an existing piece of real estate to determine where it is out of compliance with accessibility and other legal codes. The ultimate goal is to ensure that nonprofits maintain a healthy work environment.

Facilities Renovation

A facilities renovation project encompasses many of the above services and most directly leads to the alteration of the aesthetic and functional spaces associated with a nonprofit's facilities.

Marketing/Branding

Program Marketing Plan

A program marketing plan lays out a strategy and action plan for engaging people or organizations in a nonprofit's program. This could include marketing to clients and/or volunteers involved in the direct delivery of a service. The project includes research to understand the audience(s) and then definition of the right vehicles and moments to deliver communications. It does not include the execution of the plan.

Organizational Positioning & Key Messages

An organizational positioning and key messages project defines the prioritized target audience(s) for a nonprofit, the desired action the nonprofit wants them to take and then the positioning and messaging that is likely to be effective in activating the audience. Ideally, this project includes a process to test the effectiveness of the messages and positioning and a process to gain board and management buy in. It can also include training for all members of the organization to how to use the positioning and language.

Visual Identity (e.g. Logo)

A visual identity project typically provides a nonprofit with a new logo, tagline and styles guide. It can include recommendations for implementing the new identity and ideally includes significant up front research work to drive the creative direction as well as testing on the back end to determine the effectiveness with stakeholders.

Re-Naming

A re-naming project provides a nonprofit with a new name for the organization or a program of the organization. It includes a process of defining the attributes of a successful new name, developing options for new names, testing the names with stakeholders and verifying their legal availability. It can include recommendations for implementing the new name and a process for facilitating board management and key stakeholder buy in.

Legal

Organizational Risk Assessment (Risk Mitigation)

A risk mitigation assessment project will analyze an organization's strategies and organizational practices for litigation or legal risks. The outcome from advice from counsel will help identify areas where legal risk

could be mitigated. The attorneys can help advise in particular situations or on the overall risks for litigation but will not handle any pending or subsequent litigation.

501(c) (3) Filing (Incorporation)

An incorporation project can provide guidance on compliance, documentation, and filing if a nonprofit wishes to file an application for 501 (c)(3) status. The services would include: application drafting and filing, assistance with reporting and compliance, and advice on governance and operations.

Intellectual Property Protection (Copyright, Trademark, etc.)

When working on marketing and brand recognition, a nonprofit may create certain images or phrases that need to be researched and protected. The attorneys and support staff will research trademarks, service marks and advise on copyright protections for material created by the nonprofits.

Personnel Policies

A personnel policies project enables a nonprofit with full time employees/and or consultants to comply with payroll and withholding requirements and with a host of federal and local laws that regulate employment relationships. Nonprofits should know their rights and obligations as an employer and move quickly to strengthen any areas where proper compliance is in question.

Merger

Mergers often are desirable in order to ensure survival, to enhance efficiency over duplication or to ensure a strategy for growth and preserve smaller, groups with similar missions. The legal work in the sphere of mergers and acquisitions usually consists of the following major stages: agreement structuring, defining the agreement subjects, the financial sources, the description of the close out, the accounts procedure (for example, using escrow-account), the procedure of the transition of proprietary to the assets, the procedure of the payment of the close out, documentation that get the close out under control; conducting the legal due diligence of the close out; development of the merger agreement, the assurances and obligations of the sides, the buy-in scenario; the buy-in that provides the transition of proprietary to the assets and accounts; getting the close out under control. These are typically long term projects that require a great deal of sector knowledge and firm commitment over the long-haul.

Litigation

A controversy before a court or a "lawsuit" is commonly referred to as "litigation". If it is not settled by agreement between the parties it would eventually be heard and decided by a judge or jury in a court. Litigation is one way that organizations resolve disputes arising out of an infinite variety of factual circumstances. This project should determine if the end deliverable will be devising the litigation strategy, the execution of the strategy and/or the litigation support services such as copying, scanning, indexing, hosting data, producing paper copies, project management and consulting that nonprofits rarely can afford.

Financial Management

Program Cost Analysis

A program cost analysis project identifies and frames the cost initiatives a nonprofit must define to answer a pressing strategic question. The first stage is an in-depth examination of current financial data to tease out cost factors relevant to those initiatives. The second stage is preparing a comprehensive report that clearly lays out the full costs of taking on a particular initiative.

Financial Audit

A financial audit project is a process for testing the accuracy and completeness of information presented in an organization's financial statements. This testing process enables an independent certified public accountant (CPA) to issue what is referred to as an opinion on how fairly the agency's financial statements represent its financial position and whether they comply with generally accepted accounting

principles (GAAP). Although there are few laws or regulations that directly state how nonprofit organizations must operate their finances internally, there are many that have a strong indirect impact. These indirect influences include IRS reporting requirements and the accounting standards most funding agencies require supported organizations to follow. In practical terms, these "recommended" standards all but demand certain accounting and other financial practices be followed by nearly all nonprofit organizations. Board members, staff, and their relatives cannot perform audits because their relationship with the organization compromises their independence. This project type is often significantly risky as a pro bono project.

Internal Financial Controls Assessment and Design

An internal financial controls assessment and design ensures that a nonprofit is consistently recording financial transactions in an accurate fashion. These controls also help to minimize risk, including employee theft. The first step in developing an effective internal control system is to identify those areas where abuses or errors are likely to occur. Many accountants can provide you with a checklist of areas and questions to consider when you are planning your system.

Budgeting Process Design

A budgeting process design project provides a focus for an organization and its management to analyze key financial and strategic issues. Used as a diagnostic tool, a budget can help a nonprofit detect problems before they have major financial consequences, and it can help move from reactive to proactive and profitable money management. A strategic budget involves all key stakeholders in the budgeting process; tracks the status of the budget in real-time, giving key stakeholders immediate and ongoing access to current budget details; allows managers to track actual performance against the budget; and can be quickly and readily adjusted to meet changing economic conditions. It is also important to ensure the budget process ties out to the organization's operating plan and to ensure effective resource allocation.

Pricing Strategy

A pricing strategy project enables a nonprofit to value the product and service it provides to its customers/clients. Since price directly affects revenues ($\text{price} \times \text{quantity sold} = \text{revenue}$) and, therefore, profitability ($\text{total revenue} - \text{total costs} = \text{profit}$), a good place to start when developing a pricing strategy is by determining unit costs. While nonprofits are not driven by making money, net income is crucial to organizational sustainability. This project should incorporate how to calculate the appropriate costs for the product or services delivered, and develop the baseline pricing to ensure profitability which can be re-directed towards unrestricted income and/or increasing the organization's cash reserves.

Purchasing and Supply Chain Audit

A supply chain project enables an organization to procure the materials it needs to create a product, the transformation of these materials into the finished products, and the distribution of these products to its customers/beneficiaries. Often times, the marketing, distribution, planning, manufacturing, and the purchasing responsibilities along the supply chain operate independently and they each have their own objectives which are often conflicting. For example, purchasing contracts are often negotiated with very little information including basic historical buying patterns. The result of these factors is that there is not a single, integrated plan for the organization. Most organizations want to create a mechanism through which these different functions can be integrated together. Supply chain management is a strategy through which such an integration can be achieved. An audit of these systems will identify potential opportunities for increasing efficiencies and economies of scale all of which identify better performance and lower costs. A purchasing audit can be relevant for all organizations. A supply chain audit may be more commonly associated with selling specific products. However, a similar type of service delivery supply chain audit can be performed for organizations that deliver their own services.

Board

Board Effectiveness Assessment

A board effectiveness assessment project measures a nonprofit's board capacity and performance. It typically looks at the board's governance practices (structure, policies and procedures), stewardship (mission and fiduciary oversight), membership (roles, training, recruitment, engagement, performance management, etc.), resource generation (fundraising) and CEO management (succession planning, goal setting, professional development, spot coaching and evaluation).

Board Recruitment Process Design

A board recruitment process design project helps a nonprofit link their strategic and functional needs to a process that can reliably produce high-quality and engaged classes of new members. It begins with designing a method of defining the board's needs and gaps in their existing membership through articulating existing roles, responsibilities and expertise. Next steps include the formation or revamping of a Board Development Committee with a clear charter, an articulated candidate sourcing and review process, and a recruitment timeline. This work generally concludes with a defined process for orienting new members to the board to ensure their immediate and sustained engagement. This is a process design project, not the execution of the plan.

Board Reporting Dashboard

A board reporting dashboard project translates an organization's strategic and operating plans in a simple set of metrics that cover the financial, administrative, programmatic and governance performance. The project works to help reduce a broad set of metrics into a set that can quickly and effectively used by a board of directors to help them focus on the key drivers of the organization's success. The dashboard will often also include a model for visually representing analysis of the data (e.g. red, yellow or green) to put the numbers in context.

Process / Meeting Facilitation

A process and meeting facilitation project provides a nonprofit with a neutral and skilled third party that can help navigate a complex decision or process. It is typically needed when the competency is not present on the current staff, there is no capacity to play the role or the organization needs an outsider to enable all the other stakeholders to be participants and not have to also be responsible for facilitation. Occasionally it is also used to help navigate a situation that has become personally charged. Nonprofits often use this resource for management and board retreats or for a planning process.

Executive Coaching

An executive coaching project provides support and occasional advice to an individual in order to help them recognize ways in which they can improve the effectiveness of their nonprofit. Executive coaches work to improve leadership, employee engagement, teamwork, fundraising, communication, goal setting, strategic planning and other key functions of an organization.

Executive Director 360 Degree Performance Review

A 360 degree performance review project provides an executive director with feedback from all their key stakeholder groups including the board, subordinates as well as self-assessment, and in many cases external sources such as volunteers, donors, clients, peers, partners and other people with whom the executive regularly engages. The data is collected by survey or interviews by a third party who then compiles the information and draws out trends to share with the executive director. It may also include recommendations for professional development opportunities to increase the leader's effectiveness.