

# Workshop Series Proposal

## Background and motivation

This proposal follows up on a series of conversations between Mr. Tony Watkins (Community Foundation of West Kentucky), Dr. Robert Long (Murray-Calloway County Community Foundation), and Dr. Peter Weber (Murray State University) and Mr. Kevin Neal (Judge/Executive, Marshall County Fiscal Court). The focus of these discussions has been the financial sustainability of nonprofit organizations (NPOs) in Marshall County, the development of best practices in allocating public funds to local NPOs, and strengthening the overall capacity of NPOs to grow the base of support for its mission within the organization and across the community.

The broader policy context of these conversations has been the steady decline of public funds (at the national, state, and county level) available for and allocated to the nonprofit sector. The changing patterns in public spending for welfare services (through grants and contracts with nonprofit agencies) has increased the competition in the nonprofit sector for both public and philanthropic dollars.

This proposal recommends four workshops to help nonprofit organizations and their leaders to identify and develop quality practices in fundraising, fund development, outcome measurement and evaluation, and governance.

## **Workshops # 1: Fundraising and Grantwriting**

Purpose: To help nonprofit professionals to develop best practices in fundraising, to learn to navigate the world of “grant” funding, and to improve understanding of the elements of a successful grant proposal.

Description: A financially healthy nonprofit organization has a balanced and diversified set of revenue streams that advance its long-term independence and sustainability. Building a fund development strategy that responds to the various potential sources of financial support is key to attaining this goal. Participants will (1) examine the potential sources of funding support; (2) explore the range of fundraising methods available to seek support from each source; (3) learn the elements of the central method of growing support from individual donors, through a structured annual fundraising campaign; and (4) learn the steps involved in successful grant seeking.

Topics: Nonprofit sector funding sources and anticipated changes in support; how to build the case for support from each source; elements of successful fundraising methods and the characteristics of a balanced fund development strategy; building a powerful annual campaign approach; and the steps in grant seeking.

Date: First half of September (tentative)

Length: 2 hours

Facilitator: Dr. Robert Long

BUDGET		
Description	Rate	Amount/quantity
Workshop facilitator	\$115 per hour	Preparation: 4 days (8 hrs. x 4 x \$115 = \$3,680)
		Delivery: ½ day (3 hrs. x \$115 = \$345)
		Evaluation: ½ day (3 hrs. x \$115 = \$345)
Mileage for facilitator	54.5 cents per mile	
Workshop materials (handouts, binder, etc.)	\$50-\$100 (dependent on number of participants)	

### Workshops # 2: Fund Development and Endowments

Purpose: To increase competitiveness and financial sustainability of nonprofit agencies, to develop long-term fund development strategies, and to explore the role of endowments in nonprofit growth and sustainability.

Description: For many non-profits, raising money for an endowment is the ultimate dream. To have the resources and support to be able to raise an endowment above and beyond the organization's operating needs seems like a far-fetched yet very desirable goal.

The truth is that many non-profits who think they can't possibly raise an endowment actually could if they were willing to put in the hard work, and wait for the reward, over a number of years. But, you must have a plan.

Topics: What is an Endowment? Should I Raise an Endowment? The Technicalities, Why Donors Fund Endowments.

Length: 2 hours

Date: Second half of September (tentative)

Facilitator: Mr. Tony Watkins

BUDGET		
Description	Rate	Amount/quantity
Workshop facilitator	\$115 per hour	Preparation: 4 days (8 hrs. x 4 x \$115 = \$3,680)
		Delivery: ½ day (3 hrs. x \$115 = \$345)
		Evaluation: ½ day (3 hrs. x \$115 = \$345)
Mileage for facilitator	54.5 cents per mile	
Workshop materials (handouts, binder, etc.)	\$50-\$100 (dependent on number of participants)	

### **Workshops # 3: Logic models: performance and evaluation**

Purpose: To help nonprofit professionals to learn the purpose of logic models, to identify the various elements of a logic model, and to apply logic models to the various aspects of their work.

Description: As public agencies and philanthropic institutions increasingly move toward a performance based funding model, logic models are reliable tools providing nonprofit professionals with frameworks to streamline programs, assess effectiveness, and measure impact. This session introduces participants to the concept of the logic model and its components. Participants will (1) learn the role of logic models as effective tools in program design, implementation, and evaluation; (2) practice the components of logical models; and (3) develop steps to build logic models for their programs. The workshop is highly interactive and will alternative group discussion, individual and group exercises, and practical applications.

Topics: Purpose of Logic Models; Everyday Logic Models; Components of Logical models; Distinction between Outputs and Outcomes; Uses of Logic Models.

Length: 2 hours

Date: First half of October (tentative)

Facilitator: Dr. Peter Weber

<b>BUDGET</b>		
<b>Description</b>	<b>Rate</b>	<b>Amount/quantity</b>
Workshop facilitator	\$115 per hour	Preparation: 4 days (8 hrs. x 4 x \$115 = \$3,680
		Delivery: ½ day (3 hrs. x \$115 = \$345)
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Workshop materials (handouts, binder, etc.)	\$50-\$100 (dependent on number of participants)	

### **Workshops # 4: Governance and Board Orientation**

Purpose: To prepare nonprofit board members for effective leadership in the community.

Description: In a time of increasing competitiveness for public and philanthropic funds, high-impact boards bring specific expertise and community connections to nonprofit organizations. This workshop is designed to help executive directors to develop effective and impactful boards and current (and future) board members to understand the requirements of highly effective boards. Participants will develop a better understanding of the role of governance structures in nonprofit organizations, the fiduciary duties of board members, and best practices in nonprofit governance and leadership. The workshop will rely on interactive exercises and provide participants with a toolkit of resources to develop effective boards.

**Topics include:** Role of the Nonprofit Sector; Leadership and Management in Nonprofit Organizations; Fiduciary Duties of Board Members; Characteristics of Effective Board Members; Role of Boards in Nonprofit Operations; Board/Executive Director Relationship.

**Length:** 2 hours

**Date:** First half of November (tentative)

**Facilitator:** Dr. Peter Weber

<b>BUDGET</b>		
<b>Description</b>	<b>Rate</b>	<b>Amount/quantity</b>
Workshop facilitator	\$115 per hour	Preparation: 4 days (8 hrs. x 4 x \$115 = \$3,680
		Delivery: ½ day (3 hrs. x \$115 = \$345)
		Evaluation: ½ day (3 hrs. x \$115 = \$345)
Mileage for facilitator	54.5 cents per mile	
Workshop materials (handouts, binder, etc.)		

**Evaluation**

A post-training survey of participants will be used to evaluate the effectiveness of each workshop and facilitator. The short survey (one page, two sided) is confidential and will be used to improve trainings. It aims to measure the extent to which the workshops improved participants’ knowledge about the topics covered in the sessions. A final report analyzing the results of the survey will be submitted within 3 weeks after the last workshop.

**Appendix: Facilitators’ bios**

Dr. Robert F. Long has dedicated his career to helping people help themselves improve the quality of their lives and the communities in which they live. The central commitment has been to the development of the next generation of leaders, preparing them for the challenges they will encounter and helping strengthen their capacity to positively impact the lives of others.

Bob retired in 2016 after serving as the Visiting Distinguished Professor of Nonprofit Leadership at Murray State University, in Murray, Kentucky. Prior to joining Murray State in 2008, Bob retired from a sixteen-year career with the W.K. Kellogg Foundation where he served as vice president for programs. His portfolio included the areas of philanthropy, community leadership, civic engagement, and traditions of giving. Before joining the Foundation, Bob served as the endowed McElroy Professor of Youth Leadership Studies at the University of Northern Iowa. Bob started his career as a youth development specialist with the Cooperative Extension Service in Illinois and Nevada.

After years of direct service work in youth and community development, Bob was given the opportunity to step into the national arena when he was appointed to the Carnegie Council on Adolescent Development in 1990. This began a journey to support the development of community leadership on

the international stage, illustrated by a decade of engagement with the Salzburg Seminar on Global Civil Society Development.

Born and raised in rural southern Illinois, Bob received his Doctor of Philosophy degree in educational leadership and evaluation from the University of Illinois. Bob and his wife, Patricia, live in Murray, Kentucky. Their daughter and two sons work in the areas of behavioral health, environmental sustainability, and college student affairs.

During his years at the Kellogg Foundation, Bob led major funding initiatives to advance diverse philanthropic transitions. For this work, he received The Changing of Philanthropy Award in 2005 from the Women's Funding Network. He was listed three different times among the "Top 50" most influential people in the nonprofit sector by the Nonprofit Times. Bob's life-long dedication to capitalizing on diversity as a central asset in community building was recognized in 2016 with the Murray State University President's Award for Diversity and Inclusion. It symbolizes a core principle around which Bob's life is guided.

Peter Weber is an Assistant Professor and Director of Nonprofit Leadership Studies at Murray State University. He holds a doctorate in Philanthropic Studies from the Indiana University Lilly Family School of Philanthropy, as well as a Master in History and a Master in International Studies in Philanthropy and Social Innovation, both from the University of Bologna in Italy.

His research focuses on the way individuals participate in public affairs through voluntary organizations and philanthropic practices. His latest research project investigates the emergence of philanthropic innovations through the lenses of program-related investments (PRIs) by private as well as community foundations. He has published extensively in peer-reviewed journals, including *Voluntas*, *Nonprofit and Voluntary Sector Quarterly*, *Journal of Civil Society*, *Global Society*, *Journal of Public Affairs Education*, and *Journal of Nonprofit Education and Leadership*.

He has taught graduate and undergraduate courses at the Indiana University Lilly Family School of Philanthropy, Indiana University-Purdue University Indianapolis School of Public and Environmental Affairs, and Murray State University. Among others, his teaching interests focus on grant-making practices, nonprofit management and governance, nonprofit advocacy and public policy, and community engagement. In recognition of his service to the field of nonprofit studies, he was recognized by the 2013 ARNOVA Emerging Scholar Award, selected as a Future Philanthropic Educator Fellow by the Learning by Giving Foundation, awarded the Service Learning Mentor of the Year by Murray State University in 2015, and selected for the New Executives to Kentucky program by Leadership Kentucky and the Kentucky Cabinet for Economic Development in 2017.

Peter is deeply engaged in local and national community. He currently serves on the board of the Purchase Area Sexual Assault & Child Advocacy Center (PASAC), where chairs the Internal Affairs Committee and is member of its Governance/Executive Committee, and on the board of the local United Way, where he sits on its strategic and allocation committees. He recently joined the board of the Murray Calloway County Community Foundation and serves on the advisory committee of the local Rotary Foundation. At the national level, he serves on the board of the Nonprofit Academic Centers Council (NACC), which is the international membership organization of nonprofit and philanthropic research centers and education programs.

Tony Watkins is the current CEO of the Community Foundation of West Kentucky and its five affiliates spread throughout West Kentucky. He is a graduate of Georgetown College, a former pastor and fundraising consultant. He counseled some of the largest nonprofits in the country through their capital campaigns including Baylor University, the Diocese of Southern Ohio, the Diocese of Minnesota and the Diocese of Upper South Carolina. Some of his other clients include the Fellowship of Christian Athletes, Focus on the Family, Mercy Health Systems, the Phoenix Christian School System, Baptist Health System and 100s of local congregations all across the United States. He was awarded the Kentucky Philanthropy Initiative Commonwealth Award in 2013 and serves as a three term Commissioner for Endow Kentucky,

He has taught various seminars for NSFRE Conferences in Louisville, KY and San Antonio, TX as well the Association for Healthcare Philanthropy Conference in Louisville, KY. He earned a certificate from the Caswell School for Planned Giving in Dallas Texas. Tony believes in philanthropy and his enthusiasm is contagious.