**The Consultants’ Core Competency Recommendations**

* **.  Effective Boards:**
  + meet on a regular basis;
  + are not comprised of relatives;
  + participate fully, are willing to take time;
  + understands legal requirements for board of duty, care, etc.
  + are stewards and doers, rather than [just] leaders.

Effective Boards contain individuals who are/have:

* + representative of target community;
  + finance skills;
  + competency in the services being provided
  + know how to run the business of a nonprofit
* **2.  Effective Communications – internal & external:**
  + Ability to communicate the vision
  + Day-to-day activities and how it fits into the long-range plan
  + Website, email; (tools and communications media)
  + Newsletters, Case statements
  + Quality communications protocols [policies, procedures list of responsibilities]
    - I need more info -- Who do I call?
    - I’m a funder, who should I talk to?
    - Who do I need approval from?
    - Critical situation – who can address my immediate need/request?
  + Protect nonprofit image, reputation with clear communications protocols
* **3.  Coherent Budget**  (doing Budgeting as part of Proposal Writing)
  + What are my project’s funding needs?
  + How will I spend the money?
  + For Scorecard:  Q: Do I have a balance and income statement every  month in the same format?
* 4**.  Foundational Statements & Strategic Plan**
  + Clear Mission statement
  + Compelling Vision
  + Statement of Values & culture
  + Strategic Plan & Roadmap
    - SWOT Analysis, Competitive Analysis are tools to create your Strategic Plan
* **5.  Program Plan** 
  + Choosing what program(s) to implement
  + Program logic model (resources, activities, expected outcomes)
  + Method of evaluating program
  + Theory of change (how you plan to bring about change)

**The Consultants’ Core Competency Recommendations cont’d**

* **6.  Organizational Development**
  + Org Chart
  + Roles & Responsibilities (Board vs Staff)
  + Staff Development
  + Managing/Supervising Staff/Personnel
  + Managing Volunteers
* **7.  Needs Assessment Methodology**
  + Data gathering & community needs assessment
  + Understanding when to apply assessment
  + Why it is important – funding is tied to the need
  + Competitive analysis (who else provides what you do?)
* **8.  Leveraging Partnerships & Collaboration**
* **9.  Successful Fund Development Strategies**
  + Diversifying Funding Base
* **10.  Nonprofit Operations:**  Protecting and Preserving the Integrity of Your Nonprofit
  + Protecting your nonprofit status - 501(c)(3)
  + Document Retention policies
  + Keep Board integrity
  + Insurance and legal liability
  + Compliance (e.g., IRS compliance, HR policies, safety, child protection, etc.)