**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.)