

Building
Excellence
Sustainability
Trusted

A Collaborative Project Serving Genesee County Nonprofits

Dear Consultant and Technical Assistance Provider:

The BEST Project is a joint initiative of the Charles Stewart Mott Foundation, the Ruth Mott Foundation, the Community Foundation of Greater Flint, and the United Way of Genesee County. Its purpose is to strategically support capacity building in nonprofit organizations that serve the Genesee County community. The United Way is the grantor and serves as general contractor for the project.

Surveys, focus groups and strategic interviews with local nonprofit leaders, regional technical assistance experts and the state and national philanthropic community helped shape the BEST Project. The funders' collaborative learned that capacity building is much more than offering technical assistance to organizations that are struggling with particular areas of management. It also requires rethinking systems and programs in a comprehensive, integrated process. Those delivering services and those supporting technical assistance need to join forces with nonprofits to identify ways to make organizations capable of dynamic sustainability, regardless of changing internal or external realities.

The pilot phase of the \$1.8M project was approved by the four funders and began in 2003. Based on its success, a new group of nonprofits joined in late 2005. Features of the project include:

- Creation of a vetted pool and directory of technical assistance providers with extensive experience in all key areas of nonprofit management;
- Assessments of participating organizations to identify strengths, diagnose needs, determine readiness and clarify opportunities for growth. Assessments also provide recommendations that serve as a basis for proposals to fund capacity building grants. Capacity building grants are designed to increase effectiveness and long term sustainability;
- Ongoing communication with individual participants build more open, respectful and trusting relationships among funders, nonprofit organizations, consultants and other technical assistance providers;
- Opportunities for ongoing learning and coaching for staff and Board members build the capacity of organizations, funders and providers;
- Evaluation and documentation of all aspects of the project will be shared with the broader nonprofit sector and determine how the project will evolve over time.

During the Assessment Phase, the focus is on establishing a clear understanding of the organization's strengths, challenges and readiness for growth and development. Comprehensive assessments include both qualitative and quantitative measures, meetings with Board and staff, a written detailed report, as well as an executive summary. It is therefore vital that BEST consultants are seasoned professionals with expertise in a variety of fields relevant to capacity building: strategic planning, fund development,

organizational assessment, governance, leadership development, human resources, financial management, technology systems and planning, and executive coaching.

Assessments are usually done by a team of consultants. Members of the team are carefully chosen based on needs identified by each organization during the application process. Assessments take approximately 4 months to complete. Findings and recommendations from the assessment form the basis for submitting proposals for the Capacity Building phase. Each assessment and capacity building project is customized to the organization involved, but consultants and other TA providers must all be vetted if project funds are used to pay them.

Consultants who apply for acceptance into the directory should understand that there will be certain performance requirements and expectations, including:

1. The assessment process will combine implementation of quantitative and qualitative methodologies, some of which are required.
2. Providers involved in the assessment phase of the project will be based outside of Genesee County; this restriction will not apply during the capacity building phase.
3. Providers will be expected to attend a training and orientation session prior to their first engagement in the BEST project, agree to have their work evaluated by an outside professional, and commit to occasional online or phone conferences.
4. In addition, candidates must agree to attend at least 2 professional development seminars annually with others in the BEST pool of consultants. This is one of several key strategies for building a network of readily available, high quality resources to nonprofits in Flint and Genesee County. Exceptions to this requirement will be limited, with approval on a case-by-case basis.
5. All work will be performed on a contract service basis.
6. Acceptance into the provider pool will not guarantee placements.
7. Matching of eligible consultants to organizations will be a joint decision based on input from nonprofits, funders, and other key stakeholders.
8. Providers not involved in the assessment and diagnostic phase may be ideal for subsequent capacity building projects that are based on those findings; similarly, providers involved in the assessment phase may or may not be utilized for capacity building projects.

Attached please find the required application form. It will be reviewed by the Director of Programs and BEST Lead Consultant; all references will be checked.

Please note: The BEST Project gratefully acknowledges Nonprofit Enterprise at Work and NEW Center in Ann Arbor, Michigan for permitting us to adapt and customize the application for their Online Consulting Directory to the specific needs of this initiative.

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Consultant Directory

Serving Genesee County Nonprofits

CONSULTANT APPLICATION FORM

Please complete this application and submit along with the supplementary materials listed below. These materials are for BEST's internal use in evaluating your application; only the information you provide in the application form itself will be included in your profile should you be accepted into the BEST Consultant directory.

- 1. Application
- 2. A current resume or C.V.
- 3. (On a single typed page) Five professional references, at least 3 of which should be nonprofits, **including the following information:**
 - a. The name of the organization
 - b. A contact person and his/her title and contact information
 - c. The type of work which you performed for the organization
 - d. When you worked with the organization
- 4. (On a single typed page) A writing sample of **no more than one page** in which you describe a recent consulting or nonprofit work experience that illustrates your consulting style and philosophy.
- 5. (Optional) Printed materials about your consulting practice or firm.

Please complete the application package and submit as indicated by one of the following

1. Mail your application package to:

BEST Consultant Directory
P.O. Box 3128
Flint, MI 48502

2. E-mail to:

aglendon@sbcglobal.net
AND
jmacree@bestprojectonline.org

For more information, please contact Jennifer Acree at jmacree@bestprojectonline.org or 810-869-1272; or Anne Glendon at aglendon@sbcglobal.net, 810-869-1274

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Consultant Directory **Serving Genesee County Nonprofits**

CONSULTANT APPLICATION FORM

Date of Application:

1. Name (or primary contact name at consulting firm):

(Optional) List names, titles, and areas of expertise of partners or staff members:

2. Name of consulting firm:

3. Mailing address:

4. City:

5. State:

6. Zip:

7. Telephone:

8. Fax:

9. Alternate/mobile phone:

10. E-mail address:

11. Web address for your consulting practice:

12. Professional Experience

Paid Nonprofit Work Experience (program, admin, or management staff)	Unpaid Nonprofit Experience (volunteering, Board service)	Consulting Experience (For- or Nonprofit)	Management Experience (For- or Nonprofit)
Years:	Years:	Years:	Years:

13. Current Professional Affiliations and Licenses:

- 1.
- 2.
- 3.
- 4.

14. Fee Structure (Check as many options as you would consider using)

- | | |
|--|--|
| <input type="checkbox"/> Negotiable | <input type="checkbox"/> Not-to-Exceed Ceiling |
| <input type="checkbox"/> Sliding Scale | <input type="checkbox"/> Retainer |
| <input type="checkbox"/> Pro Bono | <input type="checkbox"/> Installments depending on schedule of project |
| <input type="checkbox"/> By project/flat fee | |

Notes about fees or fee structure:

15. Fee Rates: Please indicate your standard hourly and day rates, and whether there are any exceptions for special services.

16. Do you consider yourself a meeting/retreat facilitator?

- yes
 no

17. Do you consider yourself a trainer in your area(s) of expertise?

- yes
 no

18. Please list up to five current or recent clients that will be listed as part of your profile (BEST assumes you have obtained permission from these clients to share this information):

19. Please provide a one-paragraph (100 words maximum) summary of your consulting practice for inclusion in a profile available to prospective clients. You might address topics such as your consulting philosophy, work style, any methodology you use, and your primary area(s) of focus.

20. Nonprofit Sector Area Experience

Please check any nonprofit sub-sectors in which you have **in-depth** experience or familiarity—either personally, as a nonprofit volunteer or staff member, or through significant consulting relationships that educated you about nonprofits in that area. **Do not** check a box only because you have had a consulting client in that area.

- | | |
|--|---|
| <input type="checkbox"/> Animal welfare | <input type="checkbox"/> Housing/Homelessness |
| <input type="checkbox"/> Anti-Discrimination | <input type="checkbox"/> Nonprofit sector issues |
| <input type="checkbox"/> Anti-Violence/Crime | <input type="checkbox"/> Philanthropy |
| <input type="checkbox"/> Arts and culture | <input type="checkbox"/> Research |
| <input type="checkbox"/> Community development | <input type="checkbox"/> Senior Services |
| <input type="checkbox"/> Children/Youth services | <input type="checkbox"/> Social Services--General |
| <input type="checkbox"/> Disability issues | <input type="checkbox"/> Sports/Recreation |
| <input type="checkbox"/> Education (K-12) | <input type="checkbox"/> Substance abuse |
| <input type="checkbox"/> Employment and training | <input type="checkbox"/> Volunteerism |
| <input type="checkbox"/> Environment | <input type="checkbox"/> Other |
| <input type="checkbox"/> Health | |

Please explain/clarify your experience or familiarity with any of the sub-sector areas you checked above. Please limit to 75-100 words.

21. Please indicate your interest in participating in the Assessment and/or Capacity Building phase(s) of the project:

22. Expertise and Skills Profile

We believe that no individual is a true “expert” in more than a few core competencies. Please check the **bold** expertise categories **under which you would like to be listed in the Directory**. Then, please indicate the type(s) of service(s) you offer. Rank the services according to your experience by placing a “1” by those you consider your primary services and a “2” by those you provide less frequently. Your resume and references should support areas identified as core competencies. ***You must rank at least one specific area of expertise under a bold category in order to be listed under that category.***

Board Governance/Development

- ___ Board Assessment
- ___ Board Recruitment
- ___ Board/Staff Relations
- ___ Board Training/Development
- ___ Constituency Development
- ___ Governance and Committee Structure

Communications/Marketing

- ___ Advertising
- ___ Advocacy and Lobbying
- ___ Event Planning
- ___ Communications Planning
- ___ Member/Volunteer Development
- ___ PR/Media Relations
- ___ Publications

Financial Management

- ___ Accounting
- ___ Auditing
- ___ Budgeting
- ___ Costing
- ___ Financial Planning/Needs Assessment
- ___ Financial Software/Systems
- ___ Finance Training

Fundraising/Development

- ___ Annual Funds
- ___ Capital Campaigns
- ___ Case for Support
- ___ Fundraising Events
- ___ Grant Writing
- ___ Individual Donor Appeals
- ___ Memberships
- ___ Planned Giving

Human Resources

- ___ Benefit Programs
- ___ Compensation
- ___ Executive Coaching
- ___ Hiring/Termination
- ___ Insurance
- ___ Legal Issues
- ___ Mediation/Conflict
- ___ Payroll Systems
- ___ Personnel Policies

Information Technology

- ___ Database Design/Construction
- ___ Information Management
- ___ IT Needs Assessment
- ___ IT Planning
- ___ IT Systems Implementation
- ___ IT Training
- ___ Programming
- ___ Software Recommendation
- ___ Software Support

Organizational Development/Change

- ___ Business Planning
- ___ Collaborations & Mergers
- ___ Managing Change and Growth
- ___ Mission Review and Development
- ___ New Org. Formation and Incorporation
- ___ Organizational Assessment
- ___ Organizational Restructuring
- ___ Strategic Planning
- ___ Transition Planning

Organizational Management

- ___ Decision Making/Communication
- ___ Diversity Training
- ___ Executive & Management Coaching
- ___ Executive Search
- ___ Interim Directorship
- ___ Job Descriptions
- ___ Leadership Training
- ___ Staffing Patterns and Structure
- ___ Stress Management
- ___ Team Building

Program Planning and Evaluation

- ___ Asset Mapping
- ___ Diagnostics
- ___ Feasibility Studies
- ___ Logic Modules
- ___ Needs Assessment
- ___ Outcomes Measurement
- ___ Program Analysis

Training

- ___ Curriculum Design
- ___ Training Implementation
- ___ Train-the-Trainer

