

IEHP Foundation Collaborative Capacity Building Grant Schedule of Classes*

To be eligible for the \$5,000 grant, funded Champions for Vibrant Health (grantees) must attend at least 90% of the classes. Classes will take place over Zoom. For any concerns or accommodation needs, please email grants@iehpfoundation.org.

Additional small group or coaching sessions may be made available upon request on a case-by-case basis.

Class	Topic	Date	Time
1	Mission, Vision and Goals Review	Tuesday, June 4, 2024	11am – 1pm
2	Financial Management for Nonprofits Part 1 – Best Practices and Compliance	Thursday, June 6, 2024	11am – 1pm
3	Financial Management for Nonprofits Part 2 – Budgeting	Tuesday, June 11, 2024	11am – 1pm
4	Financial Management for Nonprofits Part 3 – Cost of Service Delivery	Thursday, June 13, 2024	11am – 1pm
5	Nonprofit Stakeholders (Customers)	Tuesday, June 18, 2024	11am – 1pm
6	Nonprofit Landscape, Competition and Niche	Thursday, June 20, 2024	11am – 1pm
7	Board Development and Responsibilities	Tuesday, June 25, 2024	11am – 1pm
8	Monitoring and Evaluation Strategies and Tools	Thursday, June 29, 2024	11am – 1pm
<i>Week of Independence Day – No Sessions</i>			
9	Technology Transfer and Adoption for Nonprofits	Tuesday, July 9, 2024	11am – 1pm
10	Succession Planning	Thursday, July 11, 2024	11am – 1pm
Spring 2024 Cohort Graduation Thursday, July 18, 2024 11am – 1pm IEHP Foundation Office 9500 Cleveland Avenue Rancho Cucamonga, CA 91730			

**Tentative schedule, classes subject to change with advanced notice.*

Description of Classes

All classes will be facilitated by a staff member of Caravanserai Project. By the end of the training and coaching series, nonprofit leaders will enhance their knowledge of how to create sustainable structure, strategy, policies and plans to secure financial resources and support over the long term for their organizations.

Class 1: Mission, Vision and Goals Review

This class will discuss and achieve the following learning objectives:

Understanding Nonprofit Purpose and Identity

- Participants should be able to define and articulate the mission and vision of a nonprofit organization.
- Recognize the significance of these statements in shaping the identity and purpose of a nonprofit.

Aligning Goals with Mission and Vision

- Participants should understand the process of aligning specific organizational goals with the mission and vision.
- Develop the ability to critically assess whether the stated goals are consistent with the overarching mission and vision.

Effective Communication for Stakeholder Engagement

- Participants should learn how to communicate the mission, vision, and goals effectively to various stakeholders, including donors, volunteers, and the community.
- Gain skills in creating compelling narratives that convey the impact and importance of the nonprofit's work.

Class 2: Financial Management for Nonprofits - Part 1

This class will discuss and achieve the following learning objectives:

Compliance and Governance

- Participants should be able to understand the regulatory landscape for nonprofit financial management, including compliance requirements and governance structures.
- Gain insights into the importance of ethical practices, transparency, and accountability in financial decision-making within nonprofit organizations.

Risk Management

- Develop an understanding of the key financial risks associated with nonprofit operations and how to identify, assess, and manage these risks effectively.
- Learn strategies for integrating risk management into financial planning to ensure the organization's sustainability.

Best Practices

- Participants should be familiar with industry best practices in financial management specific to nonprofits.
- Acquire practical skills in budgeting, financial reporting, and financial decision-making that align with the unique characteristics and challenges of nonprofit organizations.

Class 3: Financial Management for Nonprofits – Part 2

This class will discuss and achieve the following learning objectives:

Developing a Comprehensive Nonprofit Budget

- Participants should be able to create a comprehensive budget for a nonprofit organization, incorporating various revenue sources, expenses, and programmatic needs.

Budget Analysis and Monitoring

- Gain the skills to analyze and interpret nonprofit budgets, identifying key financial indicators and assessing the financial health of the organization.

Communication and Presentation of Budget Information

- Develop effective communication skills for presenting budget information to diverse stakeholders, including board members, donors, and staff.

Class 4: Financial Management for Nonprofits – Part 3

This class will discuss and achieve the following learning objectives:

Understanding and Calculating Cost of Service Delivery for Nonprofits

- Participants should be able to define and identify the components of cost of service delivery within the context of nonprofit operations.

Strategic Pricing for Nonprofit Services or Products

- Gain insights into the principles of strategic pricing for nonprofit services or products, considering the cost structure, market demand, and the organization's mission.

Financial Decision-Making Impact

- Understand how effective management of cost of service delivery and pricing strategies impacts the overall financial health and sustainability of a nonprofit.

Class 5: Nonprofit Stakeholders (Customers)

This class will discuss and achieve the following learning objectives:

Understanding the Importance of Stakeholder Discovery

- Participants should comprehend the significance of stakeholder discovery in the products and services development process.

Effective Techniques for Stakeholder Discovery

- Develop practical skills in conducting customer interviews, surveys, and other methods to gather insights about stakeholder needs, preferences, and pain points.

Iterative Learning and Adaptation

- Develop the ability to pivot or adjust business strategies based on insights gained through stakeholder discovery, promoting adaptability and responsiveness.

Class 6: Nonprofit Landscape, Competition and Niche

This class will discuss and achieve the following learning objectives:

Understanding the Importance of Competitive Analysis

- Participants should recognize the significance of competitive analysis in shaping business strategy.
- Understand how a thorough understanding of the competitive landscape can inform decision-making and contribute to sustainable competitive advantage.

Competitor Identification and Evaluation

- Develop skills in identifying and profiling key competitors in a given market.
- Learn how to analyze competitors' strengths, weaknesses, opportunities, and threats (SWOT analysis) to assess their relative positions.

Strategic Decision-Making and Positioning

- Gain insights into how competitive analysis influences strategic decision-making.
- Develop the ability to identify opportunities for differentiation and positioning within the market, considering competitors' offerings and market dynamics.

Class 7: Board Development and Responsibilities

This class will discuss and achieve the following learning objectives:

Understanding the Role and Responsibilities of a Board

- Gain insight into the legal and ethical obligations, fiduciary duties, and governance principles that guide board members.

Building an Effective Board

- Develop skills in recruiting, onboarding, and developing a diverse and competent board of directors.
- Understand the importance of cultivating a collaborative and engaged board culture to enhance organizational effectiveness.

Governance Best Practices

- Explore governance best practices, including effective decision-making processes, conflict resolution, and board-staff relationships.

Class 8: Monitoring and Evaluation Strategies and Tools

This class will discuss and achieve the following learning objectives:

Understanding the Principles of Monitoring and Evaluation

- Participants should grasp the fundamental principles and concepts of monitoring and evaluation in the context of project and program management.

Applying Monitoring and Evaluation Tools

- Develop practical skills in selecting and using various M&E tools, including surveys, interviews, focus groups, and data analysis techniques.
- Understand how to design and implement an M&E plan that aligns with the goals and objectives of a specific project or program.

Data Analysis and Reporting

- Gain proficiency in analyzing and interpreting M&E data to draw meaningful conclusions about project or program performance.
- Develop effective communication skills for reporting M&E findings to stakeholders, facilitating informed decision-making and continuous improvement.

Class 9: Technology Transfer and Adoption for Nonprofits

This class will discuss and achieve the following learning objectives:

Understanding the Role of Technology in Nonprofits

- Develop an understanding of how technology can enhance efficiency, communication, and the overall impact of nonprofit programs and services.

Navigating the Technology Transfer Process

- Gain practical knowledge about the technology transfer process, including identifying appropriate technologies, assessing organizational needs, and planning for successful adoption.
- Understand the challenges and opportunities associated with technology transfer in the nonprofit sector.

Promoting Technology Adoption and Integration

- Develop skills in promoting and facilitating the adoption of technology within a nonprofit organization.

Class 10: Succession Planning and Nonprofit Leadership Well-Being

This class will discuss and achieve the following learning objectives:

Understanding the Importance of Succession Planning

- Participants should recognize the significance of succession planning in ensuring organizational resilience and sustainability.
- Understand the potential risks associated with a lack of succession planning and the benefits of a proactive approach.

Developing and Implementing Succession Plans

- Gain practical skills in developing comprehensive succession plans, including identifying key positions, assessing leadership potential, and creating development pathways.