



excellence in action

**Mississippi's Nonprofit Management
Certification Program**



Mississippi
Center for
Nonprofits
Working Smarter Together

A History of Excellence in Action

Excellence in Action (EIA) is based on the Mississippi Center for Nonprofits *Principles and Practices for Nonprofit Management Excellence* and is the state's only core competencies certification program of its kind for all nonprofits in Mississippi. After two years of extensive research, MCN published its highly successful *Principles and Practices* in 2007. With the publication of this document, the goal of excellence became the focus of all nonprofit endeavors, and now MCN wants to bring that same level of excellence to your organization through its Excellence in Action Program. EIA is the go-to core competencies certification program that covers everything an organization needs to achieve excellence! So, what are the ten fundamental components that you can be certified in through EIA?

Nonprofit Certification Program Components

With EIA, you and your organization will be certified in the following key areas:

- **Planning and Purpose** – Engage those you serve with your mission
 - **Fundraising** – Implement sound and successful fundraising practices
 - **Board Governance** – Provide board training that transforms leadership
 - **Public Policy & Advocacy** – Learn to be the voice for your clients
 - **Human Resources** – Identify best practices for staff and volunteers
 - **Information & Technology** – Maximize your technology needs and skills
 - **Financial Management** – Place strong financial systems in your organization
 - **Strategic Alliances** – Create proactive partnerships with others
 - **Transparency & Accountability** – Protect your organization with state and federal agencies
 - **Programmatic Effectiveness** – Develop outcomes that demonstrate your success
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- EIA is designed for adult learners like you.
 - Classes are accessible and convenient.
 - EIA is based on multiple learning strategies including online courses, webinars and face-to-face community gatherings.
 - The program focuses on practical applications with case studies, discussion-based classes, and networking with other nonprofit leaders.
 - EIA courses are taught by some of the best and most experienced nonprofit leaders throughout the state

Raising the Standards of Nonprofit Excellence in Mississippi

Funders

- Assisting in vetting your grantees
- Assuring that your grantees have more than the basic competence to run orgs
- Assisting grantees to use your resources effectively and efficiently
- Increasing nonprofit partnerships
- Reporting outcomes that matter to you, your grantees, and the community

Established Nonprofits

- Assisting in gaining funders attention
- Assisting in demonstrating a higher level of nonprofit managerial competence
- Assisting in using your resources more effectively and efficiently
- Introducing you to others in the nonprofit sector to increase partnerships
- Reporting outcomes that matter to you, your grantors, and the community
- Assisting in aligning the Board on common goals and knowledge bases
- Assisting in developing new board and staff members
- Allowing your organization customized consulting for strategic planning, policy review, grant review, etc.

Emerging Nonprofits

- Introducing you to the nonprofit sector
- Increasing knowledge of nonprofit management practices
- Assisting in demonstrating a higher level of nonprofit managerial competence
- Introducing you to funders
- Introducing you to others in the nonprofit sector to increase partnerships
- Assisting in aligning the Board on common goals and knowledge bases
- Assisting in developing new board and staff members
- Allowing your organization customized consulting for strategic planning, policy review, grant review, etc.

Individuals & Volunteers

- Focusing your interests/compassion/passion
- Offering opportunities to meet and work with others who share your mission and spirit
- Introducing you to the nonprofit sector
- Increasing knowledge of nonprofit management practices

- Introducing you to funders
- Preparing you to serve as a certified board member
- Offering fast track training that carries forward to all Board service and many alternate career tracks
- Demonstrating a personal commitment to excellence and a willingness to go beyond the standard management practices

Benefits of Certification

- Improved operations for your organization
- Personal and professional development of your skills
- Increased understanding of nonprofit leadership across your organization—from board members to executive director to other staff
- Connection with other nonprofit leaders that build partnerships
- Addition of a logo on your website and correspondence which tells your community you've been certified
- The opportunity to include certification status in resumes, proposals, foundation requests and sponsorships

Program Details

- Certification for organizations and/or individuals
- Organizational certification awarded after at least one board member, one board officer, and the executive director complete the program
- Program consists of workshops, online courses, webinars and a peer review. Course material delivered in a two-day intensive Boot Camp.
- Special value price of \$295/individual, total cost of organizational certification (3) individuals of \$885
- Limited number of free consulting hours available for enrolled organizations

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Excellence in Action Curriculum Overview

Legal Transparency

Legal compliance can make or break a nonprofit organization. It is ever changing and frequently technically difficult to interpret and implement. Being transparent in your operation to funders and constituents is equally important. This session helps nonprofits navigate this maze and incorporate excellent procedures, policies, and practices.

Organizational:

Duties of Board of Directors
Minutes, Committees, Expense Approval
Policies
Conflict of Interest
Document Retention
Employee Protection

Federal:

Maintaining Tax Exempt Status
Various Forms 990's
Unrelated Business Income
Public Disclosure Requirements
Donor Contribution Acknowledgment

State of MS:

Annual Registration
Audit Requirements
Required Books and Records
Review of Charities Laws

Employees and Tax Issues for Nonprofits:

Exempt vs. Non-exempt employees
Employees vs. Independent Contractors
Which Taxes Do We Pay?

Lobbying and Advocacy

Do's and Don'ts of Lobbying and Advocacy
Registering with the Secretary of State

The New Form 990

Core Form
Schedules A-O

Strategic Alliances & Partnerships

The adage about "strength in numbers" applies to the nonprofit sector, too. This session focuses on ways that groups can work together cutting costs, presenting better services, and reaching a broader audience. Much of this workshop is hands-on with the participants attending.

Benefits and Challenges to Collaborations
Alliance Structures and Mechanics
Identifying Nonprofits

Conditions for Types of Alliances
Environmental Scans and Strategic Gaps

Programmatic Effectiveness

How does a nonprofit know if it is being effective in delivering the services they designed and that funders are supporting? What do grants mean by “outcomes measurement”? Do you have to wait until too late to evaluate whether things are working? This workshop will assist in setting up a “ruler” to measure the work of the nonprofit, as well as tools to report the results and methods for modification when needed.

What contributes to Success?

Who will be involved in developing the process, and how?

What are you measuring, and how?

What are your mission, objectives, and clients?

What specific indicators will measure the outcomes?

How do you select data sources and data collection procedures for each indicator?

How do you analyze the outcome information?

What are the explanations for unusual or unexpected findings?

How do these results help you improve services?

Human Resources

Even if a nonprofit is an all-volunteer organization, there are important legal and management responsibilities that all nonprofits must take into consideration.

Federal, State, and Local Employment Laws

At-Will, Contractors, Exempt Employees

Compensation and Benefits

Job Descriptions, Recruitment, Interviewing

Background Checks, Drug Testing, Hiring

Performance Evaluations

Grievances and Terminations

Orientation, Employee & Volunteer Manuals, Training

Employee and Volunteer Policies, Procedures, and Code of Ethics

Public Policy & Advocacy

Public policy and advocacy by nonprofits helps give constituents a voice for community interests. Policy makers benefit from open communications which contributes to better informed policies. Advocacy can be critical to fulfilling the mission of a nonprofit.

Definitions and Comparisons

IRS Rulings and Legislation

Nonprofits Do's and Don'ts

Activities that are NOT lobbying

Permissible Election Activities

Lobbyist Registration

Strategies for Public Policy Input

Information & Technology

Well planned and well- designed technology can make nonprofit more efficient and reach more people with less effort and less time – if planned and used correctly.

Benefits of Technology

Written Technology Plan

IT Policy & Procedures Manual

IT Licenses and Laws

Databases

IT Planning In-House Committee

Asset Management

IT Equipment

Disaster Recovery Plan

Board Governance

The strength of a nonprofit's Board of Directors is a key determinant of the organization's long term success. Yet lack of clarity of the Board's role and the rotation of Board member terms make this topic one of the most frequently requested presentations.

Nonprofit Boards

Board Member Fiduciary Responsibilities

Sarbanes-Oxley

Record Retention Considerations

Models for Organizing Nonprofit Boards

Board Size

Board Committees

Board Relationships with Staff, Volunteers, and the Public

Nonprofit Board Responsibilities

By-laws, Policies, and Procedures

Whistleblower Protection

Effective Board Members

Board Recruitment

Evaluating Board Strengths and Weaknesses

Board Meetings

Financial Management

The most technically challenging aspect of nonprofit management, it is crucial that all Board and staff members have a grasp of the organization's financial practices, plans, and status This course helps interpret the language and disentangle the numbers.

Annual Reports and Financial Statements

Statement of Activities

Financial Analysis: Using Ratios with Nonprofit Financial Statements

Financial Ratios and Benchmarking for Nonprofits

Things to Watch Out For

Statement of Financial Position

Statement of Cash Flow

Financial Statements and the Question of Size

Financial Indicators

Fundraising

Nonprofit donations are an opportunity for individuals and institutions to contribute to a cause of their choosing. But with that gift comes an obligation for the nonprofit to ensure its proper handling.

Getting Started:

Necessary Paperwork / Forms

Vision & Mission

Legal Requirements

Articles of Incorporation

Board's Leadership in Fund Development

Organizational Tools

Fund Development Overview:

The Comprehensive Program

Annual Giving

Capital Campaign / Major Gifts

Planned giving

Pyramid of Giving

Ethics in Fundraising

Relationship Building:

Your Message / Case for Funding:

Public Relations

Marketing

Donors:

Individuals

Businesses / Corporations

Foundations

Types of Approaches / Contacts:

Written

Spoken Word / Telephone

Personal Visit

Direct Mail

Telemarketing

Internet

Fund Development Plan:

What your organizations has to offer donors

Your Funding Partners

Your Fund Development Goals and Outcomes

Fund Development Strategies

Fund Development Plan and Calendar

Evaluating your Efforts

Maintaining Donor Support

Future Funding

Planning and Purpose

Organizational planning is a critical process that defines a nonprofit's overall direction, activities, and strategies to be employed to fulfill its mission. Planning should unite the Board and staff members in a common goal and define the organization's purpose to the general public.

Basics of Nonprofit Strategy

Nonprofit Strategic Planning

Networking & Partnerships

Success Factors for Strategic Planning

Environmental Scans

Nonprofit Mission Statements

Nonprofit Budgets and Strategic Planning

Strategic Choice