T.RowePrice®
INVEST WITH CONFIDENCE

T. Rowe Price Foundation

2023 CAPACITY BUILDING

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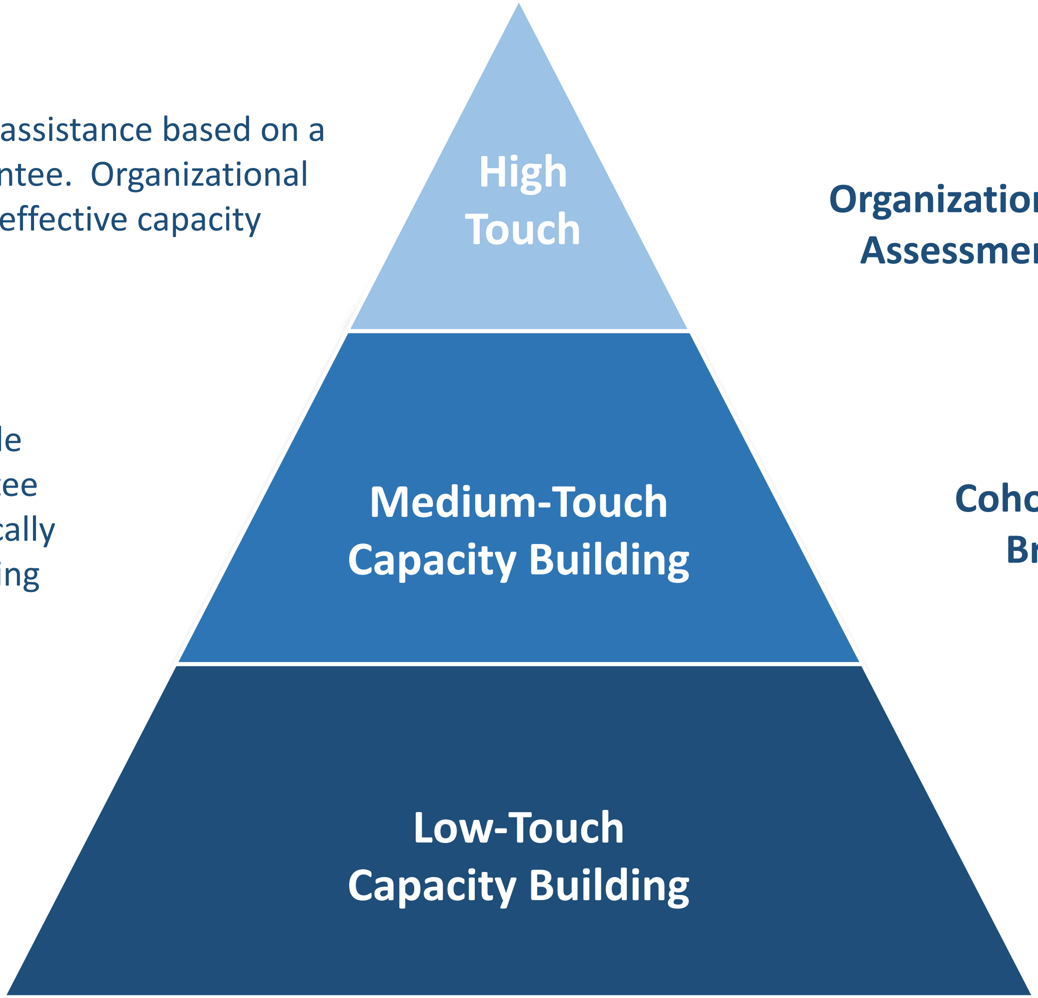
Capacity Building Approach

One-on-One Support – One-on-one assistance based on a specific need or challenge of the grantee. Organizational assessments is statistically the most effective capacity building offering.

Cohort and Small Network Convening – Targeted learning cohorts aiming to tackle specific issues that a section of our grantee pool is having. Cohort learning is statistically the second most effective capacity building offering.

Training and Technical Assistance – Low-Touch is targeted training where a large group of organizations are receiving targeted technical assistance at one time.



Organizational Assessments

Cohort Groups
Brain Trusts

Targeted Trainings

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Partner Feedback

- Fundraising Strategy
- Diversity, Equity & Inclusion
- Human Resources
- Board Governance
- Evaluation Strategies
- Financial Management
- Data Management

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Partnerships are the key to stronger organizations.

The leadership pipeline remains tenuous at best.

Effective Capacity Building requires organizations to dig deep into financial realities and sometimes face hard truths.

To increase funding, organizations need dedicated staff and capacity to support it.

The best expense is technology.

When it comes to evaluation practices, it is better to focus on learning, not counting.

There’s a difference between having a strategic plan and being a strategic organization.

Effective management can result in both stronger programs and increased revenue streams.

To achieve diversity in leadership, it’s imperative to target recruitment and advancement efforts.

Reimagine the governance structure.

Focus Area #1 – Leadership & Governance

Support Center's Interim Executive Director Training

This training is for current and former nonprofit executive directors considering a career as an Interim Executive Director, or those who are serving or have served as an Interim Executive Director and who would like specialized training. It is also open to mid- to late-career professionals who now have independent consulting practices with a focus on nonprofit organizational development and leadership transition. Training takes place at the Support Center offices in NYC.

Support Center's New Executive Director Training

This training is for first-time Executive Directors looking to enhance their leadership and management acumen and join a cohort of talented individuals at a similar point in their careers.

Executive Transition Cohort

Led by facilitator Lisa Kane, this yearlong cohort experience is for executive leaders in various stages of succession planning or transition. Leaders will build relationships, share challenges, and support peers in problem-solving and brainstorming fresh solutions. This cohort will also feature guest speakers and trainings related to governance, organizational structures, and leadership pipelines. This opportunity is by invitation-only.

Understanding Nonprofit Board Governance

A nonprofit organization's board must ensure that the nonprofit works toward its mission and serves its community. Join Maryland Volunteer Lawyers for the Arts to learn about the legal obligations of a nonprofit board, as well as an overview of nonprofit bylaws.

Brain Trusts

A "Brain Trust" is a group of peer leaders from the nonprofit sector who convene to offer rapid feedback and generate potential solutions to difficult problems. Sessions are designed to be as efficient as possible, with the goal of collecting multiple perspectives and divergent viewpoints to brainstorm, ideate, and ask deeper questions. Each session features one leader posing a challenge that they are currently working through, paired with a team of advisors who have volunteered to work through the challenge during a 90-minute facilitated dialogue.

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Focus Area #2 – Financial Management

Webinar Series: Foundations of Financial Management

Presented by Steve Zimmerman of Spectrum Nonprofit Services, the Foundations of Financial Management is a two-part 90-minute webinar series that will provide participants with an overview of the financial systems and communications that are critical for financial integrity and engagement. The first webinar will focus on integrity of financial data, covering the roles and responsibilities of staff and board members, internal controls, and the elements of financial reporting including cash versus accrual accounting. In the second webinar we'll revisit the staff and board discussion to understand the level of financial information each stakeholder needs. We'll then map these needs into a financial statement presentation. We will finish this discussion with a conversation on the purpose and utility of financial dashboards.

The Sustainability Mindset

Presented by Steve Zimmerman of Spectrum Nonprofit Services, this six-part 90-minute webinar series will provide participants will walk participants through the process of utilizing the matrix map to visualize their business model. Together, we will learn how to assess mission impact, determine profitability and plot the map. More than a picture, though, the matrix map offers strategic imperatives to drive decision making to strengthen sustainability. Participants will receive templates throughout the process to implement on their own and will have access to coaching during the process to answer their questions.

Three-Part Workshop Series and 1:1 Coaching – Nonprofit Finance Fund

Nonprofit Finance Fundamentals

This foundational workshop is designed to help nonprofit leaders who are new to finance navigate the fundamental concepts of nonprofit financial management. Even organizations that offer strong and effective programs may struggle because of the financial environment in which all nonprofits operate. In a rapidly changing world, nonprofit leaders need the skills and adaptive capacity to take advantage of new opportunities, make strategic decisions, and grow or change when necessary to meet evolving needs of their communities.

Budgeting Basics: How to Build a Budget from Scratch

Building on the nonprofit finance fundamentals, this budgeting workshop is designed specifically for leaders of small nonprofits who are at the beginning stages of their nonprofit financial management journey.

Cash Flow Planning & Considerations for Use of Debt

In this session, participants will learn how to create a cash flow projection, manage cash flow, avoid common missteps in cash flow planning, differentiate between cash and accrual accounting, and connect cash flow management to credit assessment.

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Focus Area #3 – Storytelling and Resource Generation

DesignFest
In partnership with MICA, this event pairs nonprofits with design teams to solve challenges related to visual presence such as logos, branding, web design, or marketing materials.

Communications Planning Cohort
Big Duck will lead this five-part series to help participants develop or update their organization's plan to guide their communications activities. We'll explore goals, audiences, channels, and more with lots of hands-on exercises and sharing. Participants will:

- Set a primary goal to guide their plan and select two measurable objectives
- Create a profile based on the motivations of a current or prospective desired audience member
- Apply new strategies and tactics to their communications plans
- Assign roles and responsibilities for their team
- Start mapping out a timeline for putting the plan into action

Branding Cohort
Big Duck will lead a series of six sessions, each 60-90 minutes, designed to help nonprofits develop their brand strategy through a cohort model. Over the course of two months, the Big Duck team will guide participants through the theory of informing brand strategy as well as exercises, examples, and beyond. Participating organizations will leave the cohort with draft positioning and personality statements, and an understanding of possible changes to make to their messaging and visuals. Plus, each group will receive three hours of 1:1 coaching support as they bring their brand strategy to life.

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Focus Area #4 – Diversity, Equity, and Inclusion

New Roots Learning Cohort
This cohort, led by GroCharity, this series provides new models and ideas for internal policies and practice changes that can improve an organization's approach to racial equity. Sessions alternate between learning modules and group discussions.

Undesign The Redline
This interactive online workshop will navigate participants through the virtual iteration of the long-successful physical exhibit, created by Designing The We. Undesign The Redline is a framework for unearthing our most deep, systemic and entangled crises. This interactive exhibit, workshop series, and curriculum explore the history of structural racism and inequality, how these designs compounded each other from 1938 Redlining maps until today, and how we can come together to undesign these systems with intentionality.

The BLK ED Network
Led by Jade Merritt, the BLK ED Network will develop and implement a capacity building curriculum that will address the unique needs of Black founders and executive directors leading nonprofits in Baltimore. Through the curriculum that will include small-group exercises, guest speakers, and facilitated conversation, Black nonprofit leaders will learn, grow, and enhance their nonprofit leadership skills and capabilities in a culturally-rich space.

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Focus Area #5 – Fundraising

Legacy and Planned Giving Series

Consultant Lori Kranczer offers a 3-part workshop series to help participants determine whether their organization is ready for a planned giving program, learn how to engage their board in planned giving, and create a bequest legacy program and giving case statement. After completing this series, participants will have an understanding of why planned giving is important, and how to create a sustainable and dependable revenue stream for them.

The Funding Audit

The Funding Audit is facilitated and prepared by consultant Sonia Pandit of The Pandit Group. The Funding Audit looks at an organization's anonymized individual donor data to highlight challenges and potential solutions to individual donor strategy. Recommendations are provided related to donor communications, pipeline structure, and board/staff accountability.

Meet The Funder Series

In partnership with Maryland Philanthropy Network, this 3-part series will bring together local corporate and foundations with grant-seekers. These sessions are designed to open the lines of communication between funders and nonprofits, provide information about the giving priorities and application processes, and foster better relationships between funders and prospective grantees.

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Focus Area #6 – Management and Human Resources

Human Resources Workshop Series

GroCharity Events presents a three-part series on human resource tools, tips, and best practices for HR practitioners and leaders in nonprofits or grassroots organizations. Each 90-minute virtual workshop, facilitated by a nonprofit expert, will focus on an area of challenge for most nonprofit organizations. This series is intended for leaders of grassroots organizations looking to grow their organization or team.

Understanding Human Resources: A Legal Perspective

Join Maryland Volunteer Lawyers for the Arts to learn about legal issues related to employment and staffing. The content is applicable to for-profit and nonprofit businesses with or without a dedicated Human Resources team, as well as employees who might be interested in learning more about their rights as workers. Topics will include employment classifications, employee handbooks, and more.

iCAT Organizational Assessment

The iCAT (Impact Capacity Assessment Tool) is provided year-round, at no-cost to all nonprofit organizations in the Baltimore region. The iCAT assesses six key organizational capacities: Leading, Learning, Resource Generating, Planning, Managing, and Overseeing. The iCAT report includes a score for each capacity and a series of detailed and prioritized recommendations and is delivered during an hour-long share back session with a member of the TRP Foundation staff.

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Focus Area #7 – Feedback and Evaluation

Introduction to Feedback for Nonprofits and Funders

Feedback Labs presents This 90-minute custom virtual session will provide an introduction to the stages of the feedback loop and an overview of why listening and acting on feedback is important to ethical, equitable, and well-run organizations. Participants will be invited to engage in breakout group discussions customized for nonprofits and foundations.

Virtual Feedback Crash Course

This four-week crash course will bring together 8 organizations to learn together as they go through each stage of the feedback loop and support participants who are already bought into the idea of feedback as they create their own plan to address a feedback challenge they're facing.

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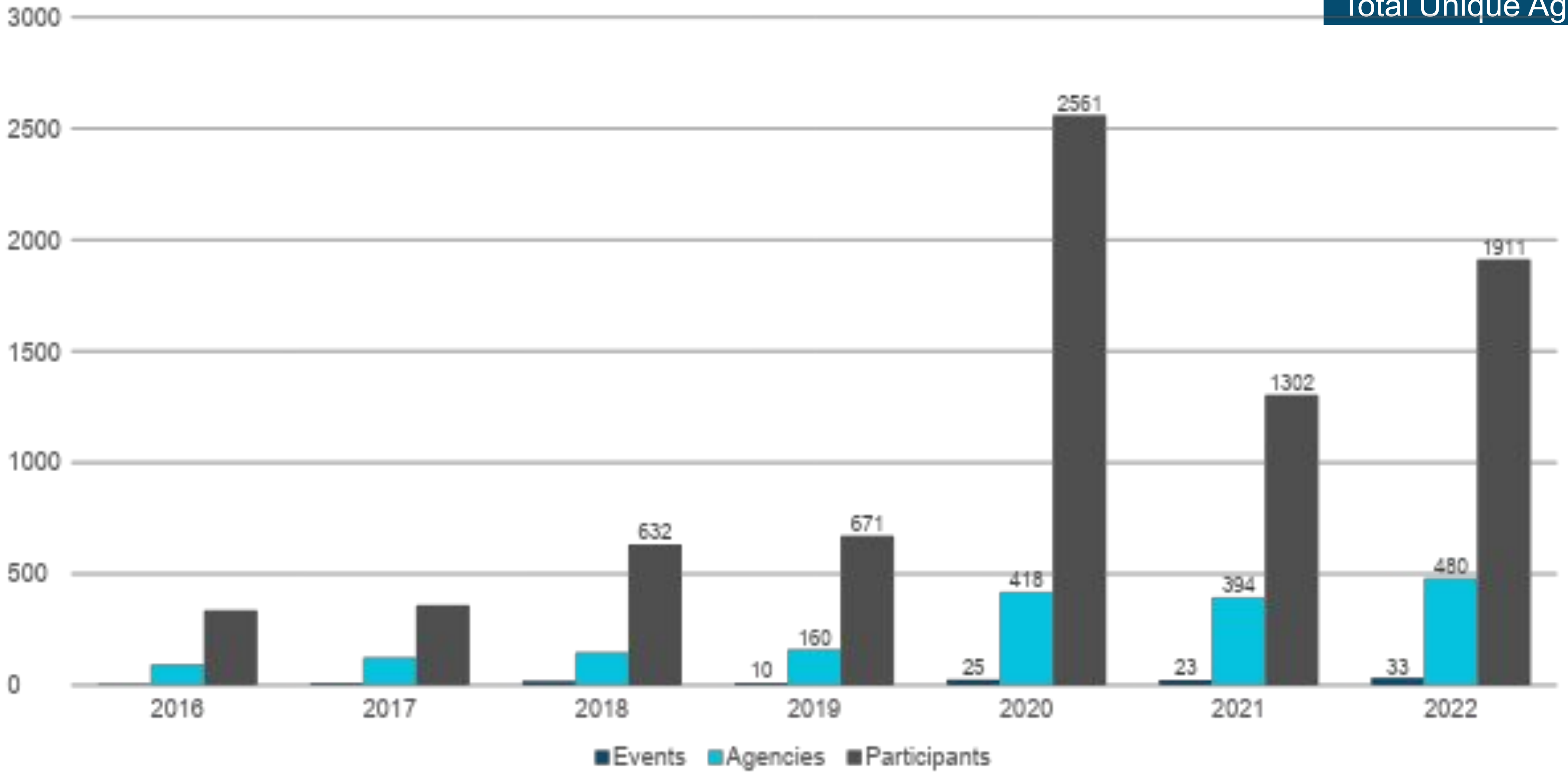
THANK YOU

Program Growth & Strategy: 2016-2022

2016-2022

Total Participants: 7,771

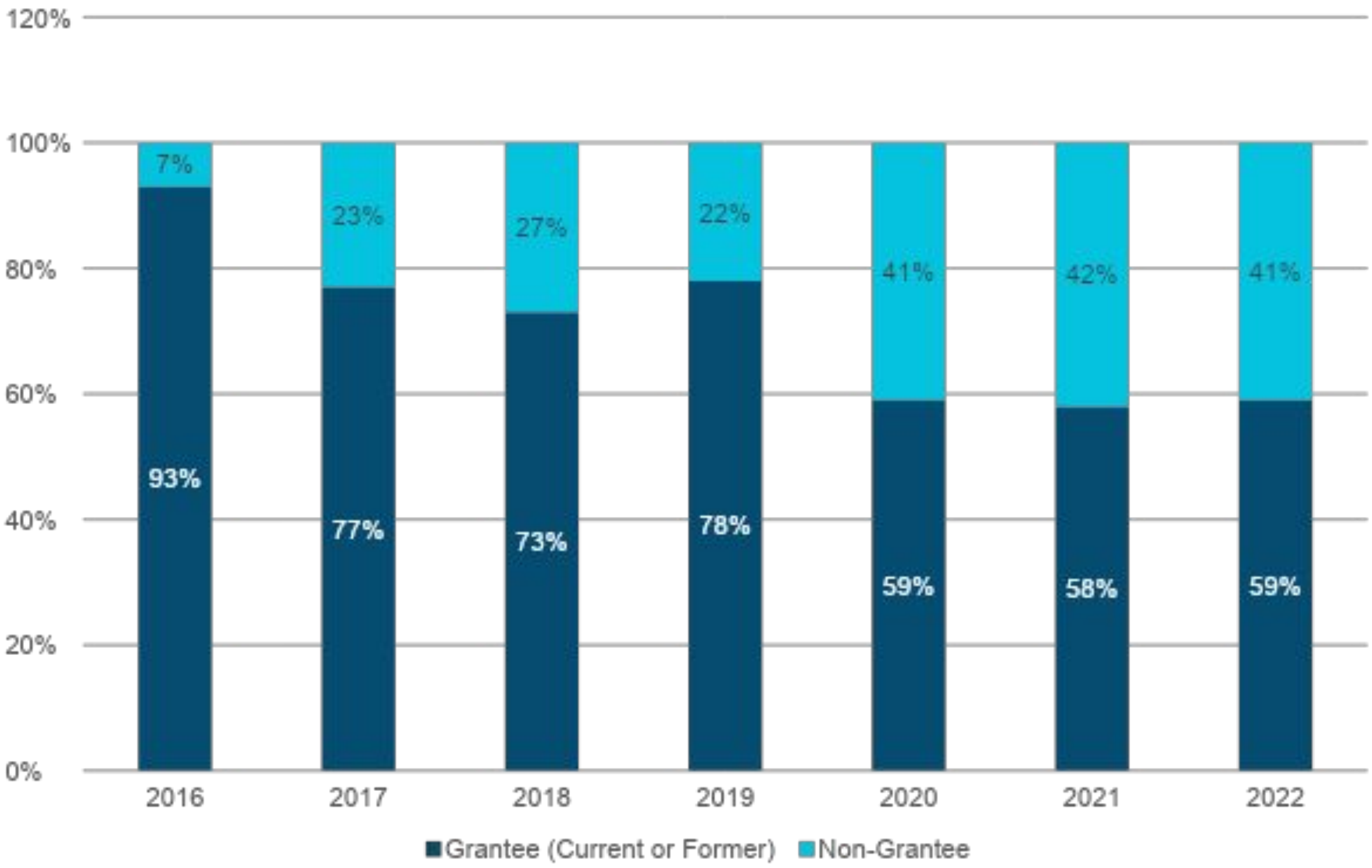
Total Unique Agencies: 833



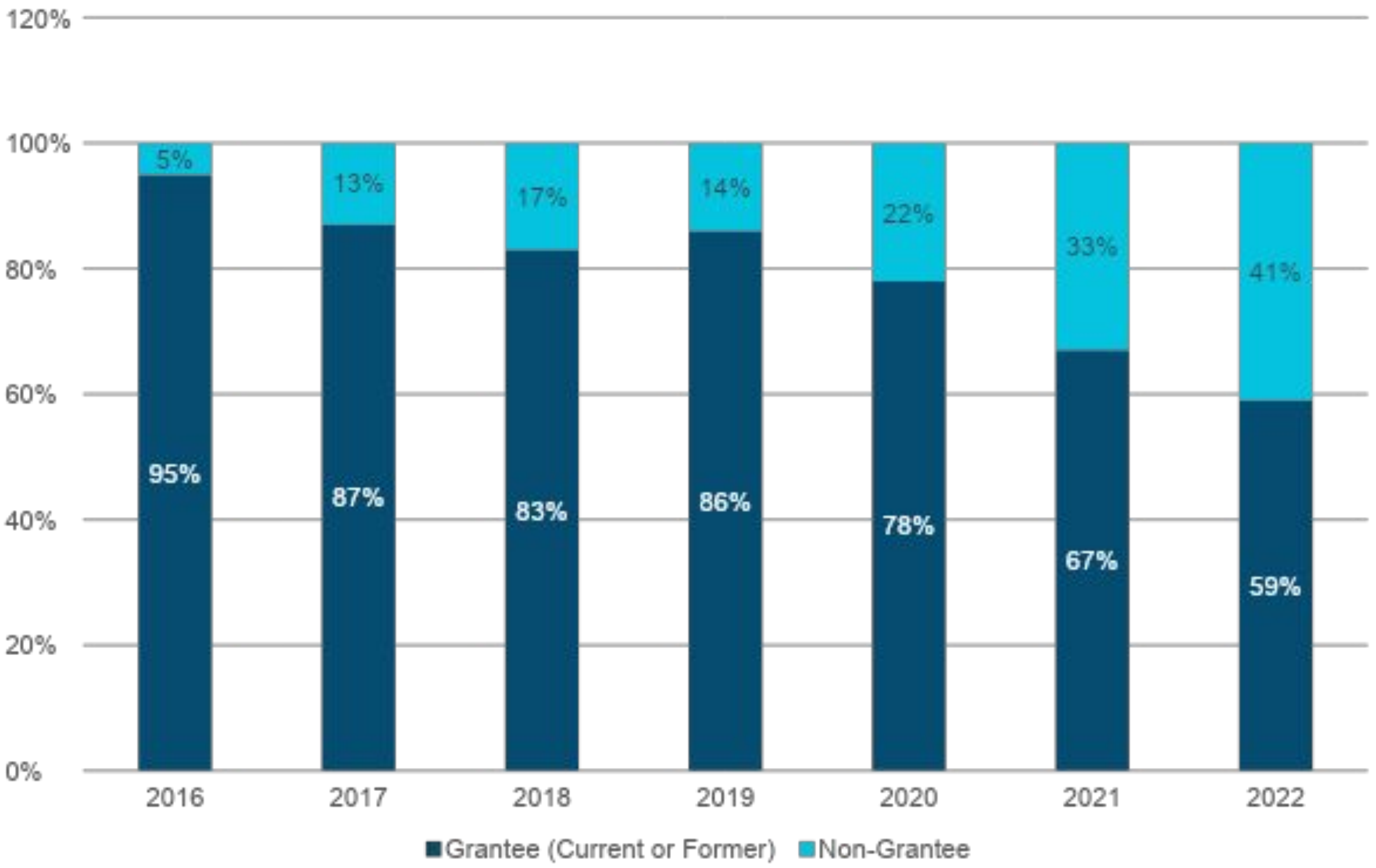
Low Touch Events ➕ Cohorts, Assessments ➕ Progressive Learning, 1:1 Coaching

Organization Participation (Grantee/Non-Grantee)

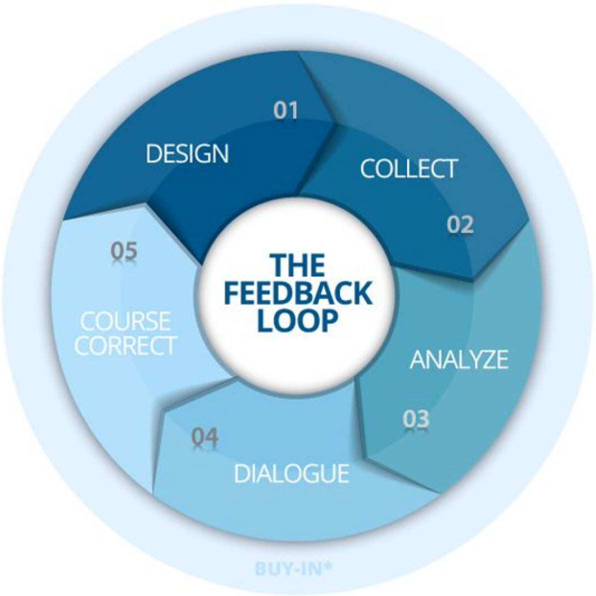
Increase in relationships with non-grantee organizations



Individual Participant Attendance (Grantee/Non-Grantee)



Feedback Labs Methodology



based on the Constituent Voice Methodology™

- Involve the people whom you seek to serve
- Create more in-depth opportunities for qualitative feedback
- Analyze with new eyes

Representative Council

- Open Call for Interest in Dec 2021
- Quarterly Meetings beginning Feb 2022
- Diverse representation from 12 organizations:
  - City of Refuge, Fuel Fund, Baltimore Collegiate, MICA, Wide Angle Youth Media, Cohado, Ballet After Dark, Parkway, MD New Directions