Welcome!
CLP Kick-Off Convening
September 18, 2013 10 AM – 4PM

Celebrating 20 Years of Growing the Grassroots
ROSE FOUNDATION
FOR COMMUNITIES AND THE ENVIRONMENT
Goal: build the capacity and sustainability of community-based organizations serving low-income people and communities of color.

- Resilient Leadership
- Adaptive Capacity
- Financial Stability
Resilient Leadership

• Unified sense of purpose across board, staff, and volunteers to pursue organizational mission

• Organizational leaders demonstrate knowledge and skills to effectively lead organizations serving low income communities and communities of color

• Management infrastructure that fosters shared leadership
Adaptive Capacity

• Clear strategic goals and a plan to achieve those goals
• Meaningful connections with community served and peer organizations
• Flexibility to identify and align with changing external/economic contexts
• Increased ability to use evaluation to continually improve performance
Financial Stability

- A clear business model and the resources (or the potential to mobilize needed resources) to achieve mission over time
- Diverse sources of earned and contributed revenues
- Demonstrated fiscal capacity to attract new donors

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Community Power

Each Group Gets 10 Minutes

1. Introduce all of your team members
2. Demonstrate your important work
3. Tell us one thing that you want to get out of the CLP
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Acta Non Verba: Youth Urban Farm Project

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Black Organizing Project

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California Healthy Nail Salon Collaborative

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California Indian Environmental Alliance
Movement Generation

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Oakland Food Connection

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OneFam/Bikes 4 Life

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PODER (People Organizing to Demand Environmental & Economic Rights)

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Lunch

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ZeroDivide

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LeaderSpring

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Definitions

Community Leadership Project = CLP or CLP 2

Community Grantees = All of you plus 50 other groups supported by other Regranteers

Regranting Organizations = the intermediaries making grants to Community Grantees (in this case us)
Who’s Who
Regranting Organizations

• Alliance for California Traditional Arts (San Joaquin Valley)
• California Rural Legal Assistance and Immigrant Legal Resource Center (San Joaquin Valley)
• Community Foundation for Monterey County and Community foundations of Santa Cruz and San Benito counties (Central Coast)
• Rose Foundation for Communities and the Environment (Bay Area)
• Silicon Valley Community Foundation (Bay Area)
Who’s Who
Leadership & Technical Assistance Providers

- CompassPoint (San Joaquin Valley)
- LeaderSpring (Bay Area)
- Nonprofit Finance Fund (all areas)
- Rockwood Leadership Institute (all areas)
- ZeroDivide (all areas)
## Capacity Plan

### Outcome Area [Adaptive, Leadership, Financial Sustainability]

<table>
<thead>
<tr>
<th>Priority of Focus</th>
<th>Strategies/Activities</th>
<th>Expected Outcomes</th>
<th>Resources/Supports Needed</th>
<th>Lead/Team</th>
<th>Time Frame</th>
<th>Progress/Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>What do we want to do?</td>
<td>How do we want to do it?</td>
<td>What does success look like?</td>
<td>What resources or TA do we need?</td>
<td>Who is responsible?</td>
<td>By when?</td>
<td>What have we accomplished?</td>
</tr>
</tbody>
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## Organizational Self-Assessment Tool

Number of Respondents: 5

### SUMMARY

<table>
<thead>
<tr>
<th>Dimensions</th>
<th>Agreement</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Average</td>
<td>SD</td>
</tr>
<tr>
<td>Vision and Planning</td>
<td>3.2</td>
<td>0.3</td>
</tr>
<tr>
<td>Evaluation</td>
<td>3.0</td>
<td>0.5</td>
</tr>
<tr>
<td>Fundraising and Resources</td>
<td>3.0</td>
<td>0.4</td>
</tr>
<tr>
<td>Budgeting, Accounting, and Reporting</td>
<td>3.3</td>
<td>0.4</td>
</tr>
<tr>
<td>The Board</td>
<td>3.1</td>
<td>0.4</td>
</tr>
<tr>
<td>Organizational Leadership</td>
<td>3.3</td>
<td>0.3</td>
</tr>
<tr>
<td>Staffing</td>
<td>3.2</td>
<td>0.4</td>
</tr>
<tr>
<td>Technology and Infrastructure</td>
<td>2.9</td>
<td>0.4</td>
</tr>
<tr>
<td>Community Engagement</td>
<td>3.5</td>
<td>0.4</td>
</tr>
</tbody>
</table>

### Key

**Agreement Scale:**
- 1 = Strongly Disagree
- 2 = Disagree
- 3 = Agree
- 4 = Strongly Agree

**Priority Scale:**
- 1 = Not a Priority
- 2 = Low Priority
- 3 = Moderate Priority
- 4 = Top Priority

Note: Don't Know/Not Applicable responses excluded

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# Capacity Plans - Example

## Urban Economy Project - FINANCIAL SUSTAINABILITY

<table>
<thead>
<tr>
<th>Priority of Focus</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Diversify our funding streams.</td>
<td>1. Expand our individual donor base. 2. More inst’ funders.</td>
<td>1. Increase our donor base by 50%. 2. Add two new inst’ funders.</td>
<td>1. System to track donors. 2. Individuals who can introduce us to funders.</td>
<td>1&amp;2 Cathy Sunshine, Dev. Director Board Chair, Fundraising Chair</td>
<td>1. End of year 3. 2. End of year 2.</td>
<td>1. Year 1 – SalesForce has donated a donor tracking system. 2. Year 1- We have a list of prospects.</td>
</tr>
</tbody>
</table>
Capacity Plans Recap

• One for each of your capacity goals
• Each group should have 2 or 3 Capacity Plans
• Prioritize them
• Make them your own
• Due December 31
Technical Assistance Grants

Each group is eligible to receive 2 payments of $7,500 for TA Grants

- For consultants or equipment that will build your organization's capacity
- Tie into your capacity plan, so do your capacity plans first
- We will develop a simple online application to apply
- In your packet is a list of consultants
- Must apply by March 31, 2014 for first installment
Annual Rose CLP Convenings

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Upcoming Events

**October 4** All CLP Grantee Convening in San Jose (required)

**October 11** Grassroots Grantee Convening on Strategic Communications in Sacramento (optional)

**October 15** Deadline to apply to Rockwood Leadership (optional)

**November TBD** Bay Area Learning Lab (required)

**November – December** Quarterly Check-in with Rose Staff on Capacity Plans (required)

**December 31** Capacity plans and report on 2013 activities due (required)
Upcoming Events

January 28, 2014 Nonprofit Finance Fund Workshop in San Jose (required)

March 31, 2014 Deadline to apply for $7,500 TA grant

October 1, 2014 Brief narrative and financial report due (required)
Help Us Promote You

Send your news stories, report, updates and photos to Marion mgee@rosefdn.org
Thank You

Please fill out the evaluation

In Packet

Or Online