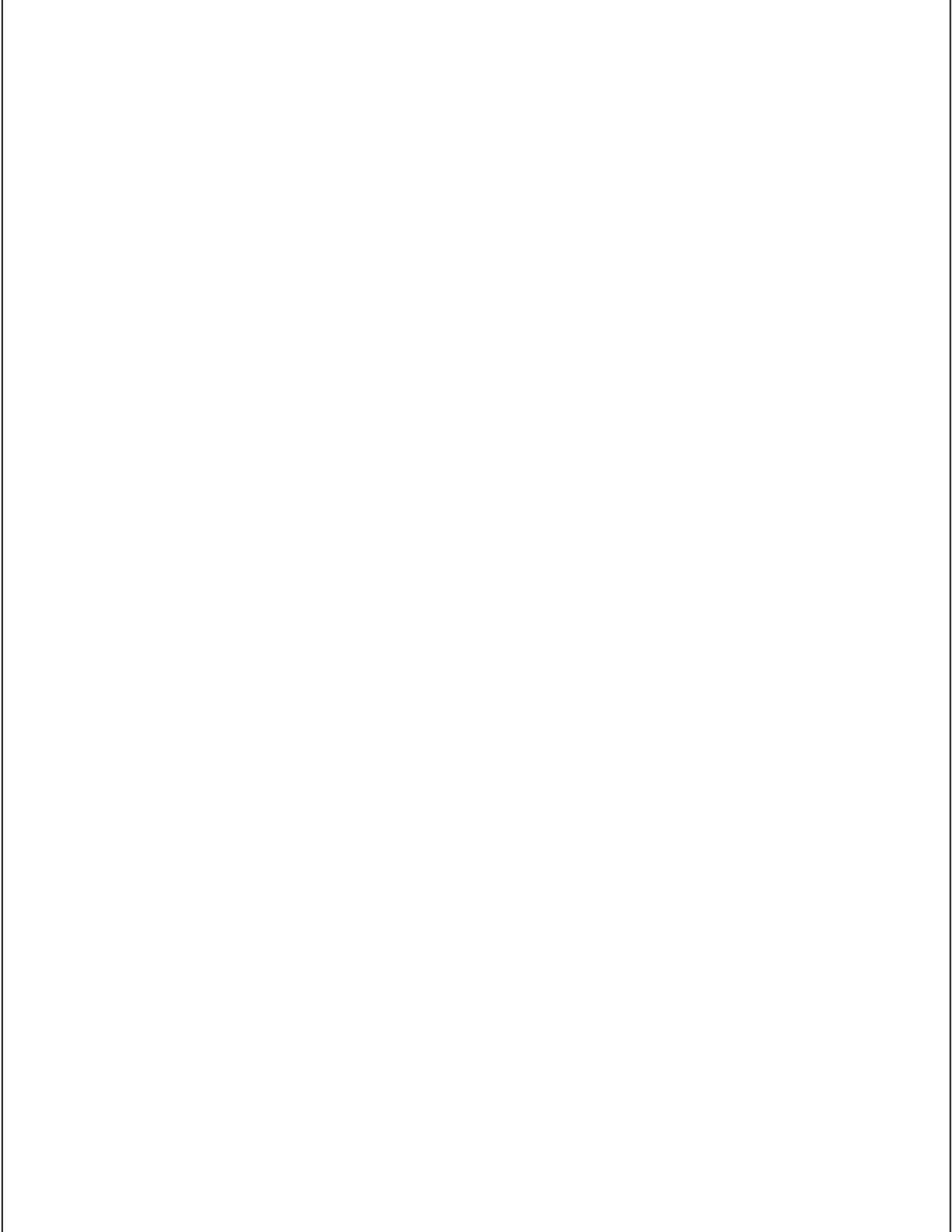


Waco Nonprofit Leadership

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# Resource Booklet



Greetings!

The purpose of this booklet is to provide Waco's newest executive leaders with an understanding of the nonprofit resources available within the Greater Waco area and fast track information that is often sought by local nonprofit executives.

The contents of this booklet, listed below, will serve as a reference for you as you move forward in your leadership role.

1. The Value in Nonprofit Boardsmanship
2. Waco Foundation's Capacity Building Program
3. The Case for Nonprofit Reserves
4. Collaborations & Local/Regional Capacity Building Tools
5. New-ish Executive Directors' Contact Information

Please make note of the upcoming trainings lists, all are being offered locally and at no cost or at low cost for our area nonprofits.

Thank you for your dedication to the nonprofit agencies you serve and for your passion and determination to better our community.

Sincerely,

Felicia Goodman  
Cooper Foundation

Mark Hobbs  
Rapoport Foundation

Ashley Allison  
Waco Foundation



## The Value in Nonprofit Board Training

As supporters of a multitude of local nonprofit organizations, we recognize the state of McLennan County's nonprofit sector is changing. The ever-increasing need and demand for services, coupled with a decrease in the resources available to help address those needs, requires nonprofits to continually adapt in order to serve their populations well.

In order to survive this fluctuating environment and meet the challenges of the future, fully-informed, effective leadership is needed from all nonprofit boards of directors. This document was developed to provide boards with simple guidelines and resources to maximize board effectiveness.

Being smart, skilled, generous and conscientious makes an individual a great candidate for nonprofit board service, but those qualities do not guarantee the individual is automatically knowledgeable of the laws, professional practice and responsibilities related to board service. The skills and experience necessary to be a board member are specific.

Each person serving on a nonprofit board should receive a basic education in general boardsmanship that goes beyond their professional training and the mission of the specific nonprofit he or she serves. Specifically, each board should be comprised of members who are collectively able to:

- Adapt and respond to changing community needs;
- Establish plans and goals for meeting the community's needs within the framework of the organization's mission;
- Secure the resources (financial, human & community) needed to fulfill the organization's mission and initiatives; and
- Set and manage appropriate budgets (both income & expense) to sustain the organization.

Further, to develop and maintain effective leadership, we encourage each nonprofit board to conduct the following basic activities:

- Ensure each board member receives a minimum of two hours of proper boardsmanship training within the first six months of joining a board.
  - A board should be aware of whether or not each of its members has ever been trained in nonprofit boardsmanship, and if so, when and how.
  - A board should also have a plan for how it will ensure this training takes place. Boardsmanship training should not be the same as an orientation about an individual nonprofit.
- Conduct boardsmanship training for the entire board on a regular basis (every three years) to ensure every member is fully aware of all board responsibilities and how those responsibilities relate to a particular nonprofit's work.
- Ensure all board members understand the board's role in fundraising, financial management, future board nomination and human resources (including board and executive director relations).

Ensuring board members are trained is not the executive director's or CEO's job. As the subordinate of the board, there is no way for the executive director to enforce requirements for board training. Each board should have a governance committee that deals with governance issues such as the bylaws and rules of the board. This group should also decide how training will be conducted and track the progress of the board members receiving training. Some boards assign the task of evaluating and implementing board training to the vice chairman, as it may help to prepare that individual to manage the board.

Where does a board start? The following are some ways to provide boardsmanship training:

- Books and informational materials are available to be provided to board members. We recommend that if a board uses this method, some effort should be devoted to discussion during meetings, to ensure that the materials have been reviewed and are clear. A collection of resources and materials is available at:
  - [cooperfdn.org/nonprofit-resources/](http://cooperfdn.org/nonprofit-resources/)
  - [wacofoundation.org/community-impact/nonprofits/capacity-building-resources](http://wacofoundation.org/community-impact/nonprofits/capacity-building-resources).
- Attend workshops in boardsmanship (Cooper Foundation routinely offers workshops on this issue).
- Divide the work among the current board by assigning each board member to research and develop a training presentation for the full board in one area of boardsmanship. Materials are available at [Boardsource.org](http://Boardsource.org) and [blueavocado.org](http://blueavocado.org).
- Hire a professional board trainer to provide instruction to the board as a group. Waco Foundation keeps a list of potential consultants from throughout the region and beyond that may be available to assist you. Additionally, there are consultants available from the following organizations who can help train your board in their roles:
  - Center for Nonprofit Management (Dallas, Texas)
  - Mission Capital (Austin, Texas)
  - [Boardsource.org](http://Boardsource.org) (Washington, D.C.)
- In addition, boards may engage a local consultant or a volunteer to provide training to the board, but should check on the individual's credentials and their resource materials before engaging them as a trainer. Examples of reputable resource materials include:
  - [Boardsource.org](http://Boardsource.org)
  - University of Texas School of Continuing Legal Education
  - Universities with nonprofit management schools and programs
  - Independent Sector
  - National parent organizations

Whatever a board chooses, it is essential that preparation and continuing education are not neglected. With a community filled with highly-trained board members, Waco will be positioned to sustain our vital nonprofits in the difficult environment we are facing as a community and a nation in the future.

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## The Case for Reserves

Cooper Foundation

The Bernard and Audre Rapoport Foundation

Waco Foundation

As donors and contributors to many of the nonprofits that serve McLennan County, and as engaged members of the larger regional and national philanthropic community, we recognize the state of the nonprofit sector is changing. The demand for services remains constant (and in some cases has increased) while the amount of resources available to meet those needs is in flux. A reduction in government support combined with a continual increase in the number of nonprofits created to do good work (a process made easier by the IRS's new application process), has increased the level of competition for philanthropic dollars.

It is in this environment that nonprofits must meet the challenge of not only doing good work, but funding it. Today the work of raising support, which is to be done by board and staff, is on-going. Best practices call for the work of raising funds to be both present and future minded - the job of raising money should not end once the funds for the annual budget are secured.

Just as it is considered good practice for individuals and families to set aside funds for a rainy day, their child's education, future travel or retirement, many foundations consider it good practice for nonprofits to set aside reserves. Specifically, it is important for the board of a nonprofit to establish, monitor and protect a specific set of funds to prepare for unforeseen circumstances and emergencies that naturally arise when conducting business. We believe that ensuring your ability to serve the community, and more specifically, your target population years from now, means thinking about your nonprofit's financial future today. We understand that many nonprofits and their donors may be challenged by (or even averse to) the notion that nonprofits should set aside money for tomorrow when great needs still exist today, but we encourage nonprofit leaders (as board and staff), to keep in mind the value strong financial health can add to their work and impact today.

### **Having stability in operations, and more specifically, in one's financial management, increases your ability to:**

- Attract donors who are looking to ensure their gifts and investments have the potential for long-lasting impact;
- Attract and retain the well qualified and skilled staff needed to run programs, deliver services and manage the nonprofits overall work;
- Expand much needed programs and/or services;
- Hire adequate staff as need and opportunity arises in order to help minimize burnout; and
- Weather fluctuations in grant funding that are the result of the ever increasing competition for grant funds.

The Nonprofit Finance Fund, a nonprofit organization and community development financial institution, provides education and support to nonprofits throughout the country on financial management and the issue of capitalization. While they recognize that each nonprofit's situation may vary, the Nonprofit Finance Fund, based on its experiences and research, has found that three to six months liquidity offers most nonprofits the ability to cover emergency situations, while six months or more of cash puts nonprofits in the ideal position to not only address emergencies, but also weather fluctuations in the economy and plan for future expansions, direction changes, staffing, etc. Ultimately, every nonprofit must find a reserve formula that works best for their circumstances and needs. As they do, they can rest assured that contrary to what they may have heard, the IRS will not penalize them for ending the year with a surplus.

For a number of organizations, a cash reserve is just a starting place. For those whose field of work is indefinite (for example, those who care for the elderly or provide the community with education services), the next step may be to create and/or grow an endowment. Because they are established to exist in perpetuity by allowing nonprofits to pull only from income once they have grown to an adequate size, endowments provide nonprofits with a steady stream of income that can be used for annual operating expenses, program or capital needs and more.

Throughout McLennan County and beyond, there are a number of nonprofit organizations experiencing financial sustainability challenges because the business model under which many of them were developed and continue to operate, leaves them in a perpetual state of need. For many nonprofits, achieving sustainability and ensuring mission completion in this new economic climate calls for moving away from the 'crisis to crisis' model of fundraising and adopting a different set of practices. Establishing and maintaining a reserve lends to your nonprofit's ability to ensure its legacy is not lost. We encourage you to consider growing your reserve today.

If you are interested in learning more about importance of nonprofit reserves, check out [Propel Nonprofits' Reserves Primer Video](#).

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Building a reserve fund can be a slow and arduous process. The first step is to learn how to talk to your donors about the importance of having a reserve (the Foundation can help with this process). Once you have tackled that hurdle, you should consider implementing any or all of the following strategies to progress your effort:

- Maximize in-kind gifts for day to day operations as well as special events and programs;
- Set and keep the goal of not passing deficit based budgets;
- Build a cushion into your nonprofit's annual budget;
- Add a 'reserves' line item into your nonprofit's annual budget and actively seek donations for it;
- Work with current donors to secure non-cash or planned gifts that can be put towards a reserve;
- Establish a policy whereby any unanticipated gift (or a percentage of it) is automatically set aside for the future.

To learn more about reserve policies, check out [Propel Nonprofits' Operating Reserves with Nonprofit Policy Examples](#).

SUPPORTING  
NONPROFITS



**COOPER HOUSE:** The Trustees and staff of the Cooper Foundation are pleased to share Cooper House with qualified nonprofit organizations. We hope you will find the House a peaceful environment in which to celebrate your successes and plan for an even more fruitful future. Visit our website to learn more.

**NONPROFIT NETWORK:** The Cooper Foundation believes that strong nonprofits help to build a strong community. To help build the capacity of nonprofits in the Waco area, the foundation hosts bi-monthly Nonprofit Network meetings. These free gatherings of Waco area nonprofit professionals and volunteers provide an opportunity for networking, peer learning, and professional development.



**BOARD GOVERNANCE TRAININGS:** Because we believe strong nonprofits are governed by strong boards, Cooper Foundation, in partnership with Rapoport and Waco Foundations, is pleased to offer a free, nonprofit board governance training periodically to current nonprofit board members, potential board members, and nonprofit staff. Our goal is to ensure all board members in Waco are trained in board governance.



# Waco Foundation's Capacity Building Program

## **Capacity Building Programs:**

Proposal  
Review

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Large-Scale  
Workshops

•

Board Online  
Self-  
Assessment

•

Leadership  
Development

•

Mini-Grants

## **Community Foundations are responsible for several roles in their communities:**

- Resource & information center
- Neutral facilitator and/or convener
- Philanthropic advisor
- Policy advocate
- Nonprofit capacity developer

## **What is Capacity Building exactly?**

- Describes activities that are designed to help improve a nonprofit's ability to meet its mission.
- Distinguishable from direct program services or capital expenses as the goal is to increase knowledge, skill level or efficiency.
- Essential component of the nonprofit sector, enabling nonprofits to effectively carry out their charitable missions and maximize the value of the donations given to them by the community.
- Typically, provided by an individual outside of the organization that has the expertise and ability to focus on only one aspect of the organization's management.

## **Goal is to encourage:**

- Excellent board governance
- Sound management
- Cross-sector & within-sector collaboration
- Evidence informed smart/best practices
- Leadership development
- Appropriately skilled & trained staff

## **Our Capacity Building assistance usually centers on:**

- Nonprofit governance/management
- Fundraising
- Strategic planning
- Financial management
- Program measurement & evaluation
- Professional development

# Waco Foundation's Capacity Building Resources

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## Proposal Review

- As time and schedule permits, Waco Foundation staff will review draft proposals (to outside entities) and provide feedback to the organization with thoughts about how to make your request for funding stronger & more competitive. As an aside, the Foundation encourages all nonprofits to visit with staff prior to submitting a funding request to the Foundation.

## Trainings & Workshops

- Waco Foundation offers free and low-cost training opportunities to the nonprofit sector on issues related to effective nonprofit management and fund development. Waco Foundation develops an annual schedule of offerings.

## Board Online Self-Assessment

- The self-assessment is a critical component of the Waco Foundation's Building Better Boards Initiative, which was designed to promote an understanding of good board governance and provide the resources necessary for continuing board development amongst nonprofit organizations. The assessment is conducted by nonprofit groups with each member answering their questions anonymously through an online survey. Once completed, a summary report is compiled that shows summary board responses and identifies potential areas for improvement. To learn more about the Board Online Self-Assessment (BOSA), visit the Board Development Page of the Waco Foundation website or contact the Capacity Building Program staff.

## Capacity Building Mini Grant

- Waco Foundation lends support to area collaborations and nonprofits by funding trainings, the purchase of consultation services and/or equipment (as appropriate) that foster agency development and the implementation of high impact projects. Our Capacity Building Program awards mini-grants up to \$5,500 in a fiscal year to nonprofits seeking guidance, expertise in areas such as organizational assessments and strategic planning; or other support. Typically, grants may support up to 90% of total costs, which are usually paid directly to consultants or as fees for participation in trainings or events.

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## Foster Collaborations

- Most institutional funders, including Waco Foundation, encourage collaboration over duplicated services. Whenever possible, we like to see similarly focused organizations working together to foster community development and change. Nonprofits are encouraged to identify the local agencies working their field of service and identify opportunities for networking and collaboration. Area collaborations include: Prosper Waco, Housing Coalition, HOT Homeless Coalition, McLennan County Hunger Coalition, Reintegration Efforts and Veterans Coalition.

## Leadership Development

- Waco Foundation is committed to fostering the development of current and future leaders and promoting leadership succession planning as a means for ensuring Waco's continued progress. Waco Foundation supports the implementation of a local civic leadership skills training initiative, The LeadershipPlenty Institute®. As opportunity permits, the Foundation also supports the creation of leader circles, which are small, invitation only groupings of area executive directors who meet monthly on an informal basis for peer learning, sharing and collaboration.

# Community-wide Initiatives

## **Prosper Waco:**

Prosper Waco's mission is to build an environment in which all members of our Waco community are able to measurably improve their education, health and financial security.

The organization utilizes the collective impact model which brings together key leaders and organizations in the areas of education, health and financial security to comprehensively (1) identify and quantify challenges facing our community, (2) articulate a shared vision, (3) establish measurable goals, (4) facilitate implementation of strategies to address each challenge, (5) monitor progress against each goal, (6) share data and resources necessary to accomplish our collective goals, and (7) engage a broad spectrum of community partners, including recipients of services, in the design of its work.

By encouraging collective impact strategies among leaders in city and county government, businesses, non-profits, healthcare, education, social services, foundations, and churches, Prosper Waco intends to build on and steadily increase the effectiveness of current efforts that address community challenges.

The strategy is to raise awareness among all members of the community, focus alignment of mutually reinforcing activities for more effective outcomes, and increase levels of engagement of individuals and organizations to bring about measurable and sustainable change in citizens' health, education and financial security.

o Contact: [community@prosperwaco.org](mailto:community@prosperwaco.org)

o Website: [www.prosperwaco.org](http://www.prosperwaco.org)

To learn more about area networks and collaborations, check out [this page](#) of Prosper Waco's website.

## **Act Locally Waco:**

Act Locally Waco's mission is to build channels of communication that make it easier for the people of Waco to get informed about and involved in building a terrific community. The organization hosts an informative website and Facebook page and distributes a weekly newsletter that provides information on a variety of activities and events taking place in Waco. Act Locally Waco is a great source for sharing information about your agencies upcoming community events, including fundraisers

o Contact: [hello@actlocallywaco.org](mailto:hello@actlocallywaco.org)

o Website: [Act Locally Waco – Enjoy Waco! Get involved!](#)

## Local Capacity Building Tools/Resources:

### **Association of Fundraising Professionals:**

Network of area professional development fundraisers.

o Central Texas Chapter of the AFP: [centexafp.org](http://centexafp.org)

### **Charity Champions:**

Nonprofit organizations chosen by TFNB Your Bank for Life employees after being nominated by the community. Recipients get an awareness marketing campaign and leadership training at no charge.

o Website: [www.charitychampions.org](http://www.charitychampions.org)

### **LeadershipPLENTY Institute Waco:**

A free leadership skills development program implemented by a partnership of community stakeholders (including the Cooper and Waco Foundations) that takes participants through a series of 10 modules covering a variety of issues like asset based inquiry, conflict management, moving from talk to action and more. The program offers day and evening classes to accommodate interested participants. LPI Program Manager Caelie Terrazas, can be contacted via email at [caelie\\_terrazas@baylor.edu](mailto:caelie_terrazas@baylor.edu).

o Website: [Home | LPI \(lpiwaco.org\)](http://Home|LPI(lpiwaco.org))

### **MatchWaco:**

An initiative supported by Baylor's Office of External Affairs that provides an outlet for individuals to get involved in leadership positions. This, along with LeadershipPLENTY Institute, can be an outlet for finding new board or committee members.

o Contact: [External Affairs | Baylor University](http://ExternalAffairs|BaylorUniversity)

### **Nonprofit Network:**

Bi-monthly networking and learning opportunity for area nonprofits hosted by Cooper Foundation.

o Contact: [info@cooperfdn.org](mailto:info@cooperfdn.org)

### **Racial Equity Training & Support:**

The Cooper and Waco Foundations have partnered together to offer free community trainings and resources that seek to build the community's capacity to have constructive dialogues on race. This joint initiative offers training on topics that include the role of socialization and bias on race, the history of race and racism in America and its impact on present day experiences and outcomes, as well as focused conversations and gatherings designed to build community and support local agencies and institutions seeking to address racial inequity. Contact the Cooper or Waco Foundations to learn more.

**Waco Foundation's Capacity Building Program:**

Variety of programs and services offered by Waco Foundation designed to help improve a nonprofit's ability meet its mission.

o For information, visit <https://wacofoundation.org/community-impact/nonprofits>

**Regional Capacity Building Tools/Resources:****Dallas Center for Nonprofit Management | Dallas, TX:**

Nonprofit capacity building consultants that offer a variety of programs, trainings and services related to effective nonprofit management.

o Website: <https://thecnm.org/>

**Mission Capital | Austin, TX:**

Nonprofit capacity building consultants that offer programs, trainings and services related to closing the racial leadership gap in the social sector, increasing nonprofit sustainability and more.

o Website: <https://missioncapital.org>

# Local Meeting Spaces

Additional location ideas can be found at:

<http://www.wacoheartoftexas.com/meeting-planners/find-a-venue/>

<p>Art Center Waco 701 South 8<sup>th</sup> St. (254) 752-4371</p>	<p>Caritas of Waco 300 South 15<sup>th</sup> St. (254) 753-4593</p>	<p>Clifton House Junior League of Waco 2600 Austin Avenue Contact: Kathy Davis (254) 756-1633</p>
<p>Community Bank &amp; Trust - Trust Offices 1711 Lake Success Drive Contact: Linda Beasley (254) 757-6310 M-F, 8:30 am - 5 pm</p>	<p>Cooper House 1801 Austin Avenue <a href="mailto:info@cooperfdn.org">info@cooperfdn.org</a> <a href="http://www.cooperfdn.org">www.cooperfdn.org</a> (254) 754-0315 9 am - 5 pm</p>	<p>Dewey Park Recreation Park Center 925 N 9th Street Contact: Felicia Bible (254) 750-8687</p>
<p>ESC Region 12 2101 W Loop 340 Contact: Amy Schroeder (254) 297-1285</p>	<p>Good Neighbor House 2301 Colcord Avenue <a href="mailto:goodneighborwaco@gmail.com">goodneighborwaco@gmail.com</a> (254)-716-3079</p>	<p>Greater Waco Chamber of Commerce 101 S 3rd Street Contact: Debbie McCutchen (254)-752-6551</p>
<p>Habitat for Humanity 220 N 11th St. Contact: John Alexander (254) 756-7575 M-F, 8 am- 5 pm</p>	<p>Insurors of Texas Meeting Room 225 S. 5th St. Contact: Krispen Thielepape (254) 759-3701 8 am - 5 pm</p>	<p>Magnolia Headquarters 900 Franklin Ave. Contact: Justin Rosalino</p>

# Local Meeting Space continued.

Additional location ideas can be found at:

<http://www.wacoheartoftexas.com/meeting-planners/find-a-venue/>

<p>St. Alban's Episcopal Church 305 N 30th Street Contact: Jesse Lee <a href="mailto:jesse@stalbanswaco.org">jesse@stalbanswaco.org</a> (254) 752-1773 8 am – 5 pm</p>	<p>Texas Life Annex 1000 Washington Avenue Contact: Donna Tomlinson <a href="mailto:dtomlinson@texaslife.com">dtomlinson@texaslife.com</a> (254) 745-6303 8 am – 5 pm</p>	<p>Texas Sports Hall of Fame 1108 S. University Parks Drive Contact: Krista Martin <a href="mailto:krista.martin@tshof.org">krista.martin@tshof.org</a> 254) 756-1633</p>
<p>Waco Transit Office 301 S. 8th St. <a href="mailto:wtscomments@wacotx.gov">wtscomments@wacotx.gov</a> 254) 750-1900</p>	<p>Waco- McLennan County Library:</p>	<p>Central Library 1 717 Austin Ave (254) 750-5943 Monday-Wednesday, 10 am- 9 pm Thursday- Saturday, 10a.-6 pm Sunday, 1-5 pm</p>
<p>East Waco Library 901 Elm Avenue (254) 750-8620 Mondays: 10 am – 9 pm Tuesdays- Saturdays: 10 am – 6 pm</p>	<p>South Waco Library 2737 S. 18th Street (254) 750- 8627 Mondays, Wednesdays-Saturdays 10 am – 6 pm Tuesdays 10 am -9 pm</p>	<p>West Waco Library &amp; Genealogy Center 5301 Bosque Blvd, Ste.275 (254)245-6018 Mondays, Thursdays 10 am- 9 pm Tuesday, Wednesday, Friday, Saturday 1-5pm</p>



## Cooper Foundation

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**Cooper Foundation** is a public foundation established by Madison Cooper, Jr. in 1943 in honor of his parents, Madison A. and Martha Roane Cooper. The Foundation meets its mission of making Waco a better or more desirable place to live by making grants to eligible nonprofit organizations in Waco, working with nonprofits to help them become stronger and more effective in the work that they do, and serving as a community convener. Grant applications are considered throughout the year. The Foundation headquarters is located in the historic Cooper House, which is available to local nonprofits for meetings and events. For more information, please visit [www.cooperfdn.org](http://www.cooperfdn.org).

## Rapoport Foundation

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**Rapoport Foundation** is a private foundation founded by leading philanthropic family, Bernard & Audre Rapoport in 1986. One-third of the Foundation's annual grantmaking budget is dedicated to support the needs of residents of Waco and McLennan County, TX. The primary focus of the Foundation's local work is on programs that benefit children and youth, imaginative and long-range solutions to the problems of disadvantaged and underserved members of our community, and ideally solutions that can be replicated in other communities. The Foundation prefers to concentrate on five primary areas: education, arts & culture, health, community building & social services, and democracy & civic engagement. The Foundation considers grants through an open cycle in the Spring & Fall of each year. To view specific due dates, recent awards, and other timely information about Rapoport Foundation's work, please visit [www.rapoportfdn.org](http://www.rapoportfdn.org).

## Waco Foundation

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Waco Foundation

**Waco Foundation** is McLennan County's community foundation and was founded by R.B. and Edith Heinze Parrott in 1958. Waco Foundation provides a wide-range of charitable services to Waco and McLennan County through our roles as a convener, grantmaker, listener, resource organizer and philanthropic promoter. The mission of Waco Foundation is to promote solutions to community challenges, strengthen local nonprofits, engage philanthropists and manage charitable assets in order to improve quality of life in McLennan County. Waco Foundation has multiple discretionary grant cycles throughout the year. In addition, the Foundation's Capacity Building Program offers mini-grants throughout the year to eligible nonprofits to promote: excellence in board governance, strategic collaborations, leadership development, strategic planning, fundraising training, the development and use of best practices in management and operations and similar administrative efforts. For more information, please visit [www.wacofoundation.org](http://www.wacofoundation.org).