

bluegreen RESEARCH INSTITUTE

Capacity Building Classes

Fall 2009-Spring 2010

bluegreen RESEARCH INSTITUTE, based in Bridgeport, Connecticut is a boutique service provider assisting workforce, economic development and business entities to understand complex issues related to policy, strategy, and human capital planning. Our goal is to help clients understand and use data to make practical and professional decisions related to their industries, while providing access to “Blue Oceans” of opportunities in growing Green and mature industries.

Classes are available upon request and delivered on-site or in our training facility in Bridgeport, Connecticut. All classes are two hours in length and can be customized for content.

Call 203-610-8554 for more information and pricing.

Board of Directors
COURSE SYLLABUS

INSTRUCTOR: Michael McCarthy

COURSE OBJECTIVES

1. To introduce students to how non-profit Boards function and why.
2. To introduce students to various components that strengthen Board of Directors and the agencies they serve.
3. To provide students with a Board self-assessment tool to assess their Boards effectiveness in fulfilling key governance responsibilities.
4. To provide students with opportunities to understand the Board members perspective.

COURSE TOPICS - The course will cover the following topics:

1. Ideal Board members*
2. Ten Basic Responsibilities of Nonprofit Boards
3. Roles of the Board Chair
4. Ten Essential Responsibilities of the Board Chair
5. Elements of Board Recruitment
6. Board Composition
7. Board Orientation
8. Creating Board Committees
9. Board Meeting and Minutes
10. Board Self-Assessment **

*Based on assigned reading.

** Requires homework assignment or hand-out.

REQUIRED READINGS

Why Board Don't Govern by Jan Masaoka and Mike Allison

Revenue Development Strategies
COURSE SYLLABUS

INSTRUCTOR: Michael McCarthy

COURSE OBJECTIVES

1. To introduce students to alternative methods of developing revenue strategies.
2. To educate students on various examples and types of fundraising.
3. To provide students with tools to educate their Board on fundraising.
4. To begin to have students explore types and ways organizations can generate new revenue such as fee-for-service or social enterprises.

COURSE TOPICS - The course will cover the following topics:

1. Type of fundraisings
2. Motivating the Board*
3. Individual and Planned Giving
4. Capital Campaigns
5. Annual appeals
6. Special Events
7. Creating a Fee-For-Service
8. Social Enterprise

*Based on assigned reading.

REQUIRED READINGS

Four Steps to Take Board Members from Fear of Fundraising to Enthusiasm by Gail Perry, June 2008

Non-Profit Financial Management
COURSE SYLLABUS

INSTRUCTOR: Gino Venditti

COURSE OBJECTIVES

1. To introduce students to basic non-profit accounting.
2. To educate students on the need for sound financial management.
3. To provide students an understanding of the audit process.
4. To provide students a basic understanding in fiscal integrity with checks and balances.

COURSE TOPICS - The course will cover the following topics:

1. Non-profit accounting
2. Financial management
3. Checks and Balances
4. Audits
5. Cash
6. Fraud and abuse
7. Filings –IRS 990

REQUIRED READINGS

Seven Characteristics of Financially Healthy Nonprofits by the Stevens Group at Larson Allen

Planning for Your Future
COURSE SYLLABUS

INSTRUCTOR: Michael McCarthy

COURSE OBJECTIVES

1. To introduce students to basic strategic planning concepts.
2. To educate students on various examples and types of strategic planning.
3. To educate students on the process of program development.
4. To educate students on how to select and work with consultants.

COURSE TOPICS - The course will cover the following topics:

1. Types of strategic planning
2. Mission, Vision, Goals and Objectives
3. S.W.O.T.
4. Needs assessment
5. Conducting market analysis
6. New program development
7. Working with consultants

REQUIRED READINGS

Strategic Planning: Cutting Through the Buzz by Cheryl Gidley
<http://www.guidestar.org/DisplayArticle.do?articleId=845>

Non-Profit Legal Clinic
COURSE SYLLABUS

INSTRUCTOR: Adrienne Parkmond, Esq.

COURSE OBJECTIVES

1. To introduce students to basic legal concepts.
2. To educate students on various examples and types of protection mechanisms.
3. To educate students on legal risks in the non-profit sector
4. To educate students on contracting process.
5. To provide a general Q&A opportunity for participants.

COURSE TOPICS - The course will cover the following topics:

1. General liability and risk
2. Protection of assets
3. Insurances (D&O Insurance, Error and Omissions)
4. Forming non-profits (Brief overview)
5. Contracting
6. Lobbying
7. Bidding and contract management
8. One-On-One Technical Assistance/ Q&A

REQUIRED READINGS

TBD

Information Technologies (IT) for Not-Profits
COURSE SYLLABUS

INSTRUCTOR: Michael McCarthy

COURSE OBJECTIVES

1. To introduce students to basic IT functions.
2. To educate students on the need for strong IT capacity.
3. To provide students an understanding basic software and hardware applications.
4. To introduce students to the concept of technology planning.

COURSE TOPICS - The course will cover the following topics:

1. Hardware
2. Software (Operating system, Office products, Donor, Accounting)
3. Technology needs assessment
4. Technology planning
5. Procurement & Funding
6. Virus Protection
7. Data storage and back up
8. Networking
9. Peripherals (printers, fax, scanners, LCD, IP phones, etc.)
10. Energy savings

REQUIRED READINGS

Is Your Nonprofit a Hummer? By Jim Lynch and Willow Cook

<http://www.techsoup.org/learningcenter/hardware/page7627.cfm>

Marketing Your Efforts
COURSE SYLLABUS

INSTRUCTORS: Jo Shute & Melanie Blanco

COURSE OBJECTIVES

1. To introduce students to basic marketing concepts.
2. To educate students on the need for strong marketing elements.
3. To provide students with tools to better market their programs and projects.

COURSE TOPICS - The course will cover the following topics:

1. Branding and positioning
2. Outreach and building awareness
3. Developing printed collateral
4. Campaigns (using multiple marketing elements)
5. Using the web to market yourself
6. Annual reports
7. Publicity and working with the media
8. Newsletters
9. Matching tools to different audiences
10. Develop marketing objectives

REQUIRED READINGS

TBD

Non-Profit Human Resources (HR)
COURSE SYLLABUS

INSTRUCTOR: Gino Venditti

COURSE OBJECTIVES

1. To introduce students to basic non-profit human resource functions.
2. To educate students on the need for sound HR management functions in non-profit entities.
3. Provide students with examples of policies and procedures for managing human capital.

COURSE TOPICS - The course will cover the following topics:

1. HR Policies and procedures
2. Recruitment and selection
3. Hiring and firing
4. Managing benefits
5. Insurances, retirement and other benefits.
6. Job evaluation
7. Staff development and training
8. Compensation

REQUIRED READINGS

TBD

Grant Management
COURSE SYLLABUS

INSTRUCTOR: Michael McCarthy

COURSE OBJECTIVES

1. To introduce students to common issues in grant management.
2. To provide students with a “how to guide” on grant management .
3. To provide students with opportunities to understand the funders perspective on grant awards.
4. To provide students with an understanding of the evaluation process.

COURSE TOPICS - The course will cover the following topics:

1. Grant award process
2. Program/Project Management
3. Contracting
4. Marketing/Outreach/Communication
5. Evaluation
6. Reporting
7. Monitoring/Compliance
8. Partnerships

REQUIRED READINGS

Grants Evaluation: Funders Want Introspection By Judith Margolin (August 21, 2008)

Grant Writing 101 and 202 (2 Classes)
COURSE SYLLABUS

INSTRUCTOR: Michael McCarthy

COURSE OBJECTIVES

1. To introduce students to grant writing basics.
2. To provide students an understanding of how to research and find grant opportunities.
3. To provide students with a template for successfully developing applications to federal, state, foundation and corporate funding sources.
4. Provide students with a grant writing example from RFP announcement to actual submission.

COURSE TOPICS - The course will cover the following topics:

1. Conducting a grant search
2. Process for evaluating grant opportunities to pursue
3. Tips and tools to begin to organize information and ideas
4. How to conduct needs statement research
5. Developing program strategy or approach
6. Completing forms and required documentation
7. Letters of support and leverage
8. Letter of Agreements/Memorandum of Understanding (MOU)
9. Evaluation/Logic Model demonstration
10. Budget and Budget Narrative

REQUIRED READINGS

TBD

Instructor Biographies

Michael J. McCarthy, Director

Areas of expertise: organizational development, program management, fundraising, board development, grant writing, federal grant compliance, evaluation and research.

Michael McCarthy is the Director of the bluegreen RESEARCH INSTITUTE, a fee-for-service division of The WorkPlace, Inc., (Southwestern Connecticut's Regional Workforce Development Board) located in Fairfield County, Connecticut. Mr. McCarthy strategically develops workforce solutions, specific to industry sectors of the economy that serve as engines of growth. In October 2002, The WorkPlace launched the Center for Capacity Development (precursor to bluegreen), a fee-for-service program aimed at building the financial, programmatic and organizational capacity of businesses, not-for-profit organizations, community-based organizations, faith-based organizations and governmental agencies to identify, secure, and manage funding from a variety of sources. To date, the Institute has assisted over 150 organizations from around the country and has secured over \$22 million in competitive funding. Prior to joining The WorkPlace, Mr. McCarthy worked for the City of Bridgeport where he was involved in both economic and community development initiatives. Mr. McCarthy is a frequent presenter at conferences and seminars on economic and workforce development topics. Mr. McCarthy holds a Masters of Science in Urban Management from Southern Connecticut State University and a Bachelor of Arts in Political Science from Albertus Magnus College.

Ms. Adrienne Parkmond, Esq., Vice President of Operations

Areas of expertise: legal issues, contract, incorporation, by-laws, policies and procedures, program management, program development, human resources, strategic planning and evaluation.

As Vice President of Operations for The WorkPlace, Inc., Ms. Parkmond builds upon her wealth of knowledge in the employment and training arena. Ms. Parkmond has over ten years experience in workforce development as a former Regional Director for the Connecticut Department of Labor. Ms. Parkmond has experience administering the State's unemployment insurance program; job training programs and welfare to work programs. Ms. Parkmond is responsible for all program operations at The WorkPlace including: Welfare to Work, Temporary Assistance to Needy Families, Workforce Investment Act services, Youth Programs and all competitively-procured grants. Adrienne teaches legal specialty courses at Naugatuck Valley Community College and Teikyo Post University. Ms. Parkmond has a B.S. in Finance from Villanova University and a Juris Doctorate from Quinnipiac University. Adrienne is Chairperson of the National Congress of Black Women, President of the National Association of Negro Business and Professional Women's Clubs, Inc. and Commissioner for the City of Waterbury Human Rights Commission, Charter Revision Commission and Board of Assessment Appeals.

Mr. Gino Venditti, Chief Administrative Officer

Areas of expertise: financial management, technology planning, audit, board management, grant development, strategic planning, human resources, non-profit incorporation and real estate management.

Mr. Venditti has been in this capacity for eleven years and has held similar positions in other nonprofits throughout his career. His major responsibilities have included all aspects of fiscal management, budgeting, auditing, accounting and related software procurement and garnering business services contracts. Mr. Venditti earned his Bachelor of Science degree from Sacred Heart University. Mr. Venditti oversees The WorkPlace's role in providing administrative services for nonprofits ranging from accounting management to master contractor status to acting as fiduciary of funds.

Jo Shute, Vice President of Marketing, Communications and Planning

Area of expertise: marketing, public relations, board management, human resources, program development, strategic planning, organizational development and product development.

Jo joined The WorkPlace's leadership team in 2004 as Director of Marketing, Communications and Planning. In this role, Jo directly interfaces with employers to assess needs; she oversees research and development of Workforce Investment Board materials, reports, and public information; she develops marketing and communications initiatives for The WorkPlace and its projects, and she acts as media spokesperson. Jo brings a diverse background of private sector marketing experience -- facilitating the growth of global brands, crafting new market penetration for a small "green" manufacturer, and managing her own industrial sales agency. In addition, she has served as project leader, consultant, and board member to several not-for-profit organizations. Jo is a graduate of Smith College with a Master's degree from M.I.T. Sloan School of Management.

Melanie Blanco, Manager, Communications Coordinator

Area of expertise: marketing, public relations, strategic planning, and organizational development.

Melanie joined the workplace in May 2007. Melanie has a diverse background in Marketing, Communications, and Operations with experience in Financial Services, Direct Marketing, and a Hospital. Melanie received her MBA from University of Connecticut/Stamford and her BS from George Washington University.