CUTTING EDGE RELIEF, INC.

FINAL REPORT
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ENHANCING ORGANIZATIONAL
CAPACITY TEAM

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NONPROFIT DISASTER RELIEF AND
POVERTY RESPONSE IN SPECIFIC
CONTEXTS

Cutting Edge Relief

V600 CAPSTONE

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Definition of Key Terms

Term	Definition
Faith-based organization (FBO)	A nonprofit organization with an affiliation to a religious community.
Habitual donor	An individual who gives a regular donation on a schedule. The gift fits their budget, and may support special projects. These donors see themselves as part of the organization and share the organization's ideals and vision.
In-kind donation	A non-monetary gift, such as volunteer time, physical items (food, clothing, etc).
Non-governmental organization (NGO)	A nonprofit organization that functions independently of government.
Stakeholders	The individuals who are involved with or affected by an organization. Examples include: staff, board members, volunteers, clients, and donors.
Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis	A tool for assessing the capacities of an organization. It provides a framework to consider the particular assets and drawbacks of an organization by cataloging internal capacity through Strengths and Weaknesses and external assessment of Opportunities and Threats. It can also be used to analyze specific aspects of an organization.
Thoughtful donor	An individual who gives for capital projects, endowments, or bequests. These donors consider what size gift adequately reflects how much they care about the organization's work.
Twinning	The practice of creating partnerships with similar organizations in developing countries to serve as a 'twin' organization.

Executive Summary

This report is the examination of Cutting Edge Relief (CER) by the Enhancing Organizational Capacity Team of Dr. David Bell's spring 2021 O'Neill School of Public and Environmental Affairs capstone class. CER is a domestic and international aid faith-based nonprofit organization located in Pittsburgh, Pennsylvania. The organization serves the local community, various communities in the United States, and abroad, specifically in Nepal. These services vary from educational programs in Pittsburgh, disaster relief in the southern United States, economic independence programs in Tibet, and more. It has a small staff that consists of Bill and Kimberly Richardson, a seven-member board of directors, and numerous volunteers who carry out its programs. CER received its 501(c)(3) status just over one year ago and is hoping to increase its organizational capacity, legitimacy, and volunteer base while increasing others' awareness of its work.

Further, CER presented three key questions that their organization hoped to have answered, two of which are considered in depth in this report:

- How does it expand its organizational capacity and develop a stronger volunteer force?
- How can CER improve its legitimacy and increase the awareness of the organization?

In order to provide recommendations to CER, this report examines three major areas: 1) best practices involving the expansion of organizational capacity and legitimacy, 2) fundraising and volunteer retention, and 3) background information and best practices for faith-based organizations (FBOs). This report first examines organizational capacity building through an identification of three strategic issues facing CER: limited fundraising resources, limited community awareness of the organization, and the specific definition of a mission and values which ensure that the organization retains an identity beyond the founder. Next, areas of potential growth in fundraising are identified: developing a case for support, cultivating donors, obtaining funding sources, implementing strategies for identifying donors, building a donor prospect list, and strategies for fundraising during a pandemic. Finally, best practices of FBOs in the areas of organizational transitions, board structure, partnerships with other organizations, the potential of partnering with the United States government, resource development, and volunteer recruitment and retention are examined.

The findings of this report led to the following recommendations:
- Organizational capacity building:
  - Create mission-oriented and quantifiable goals toward which progress can be measured. Use these measurable goals to promote CER's success and inform management decisions.
  - Invent and implement a plan for working with partner organizations.

- ○ Identify CER's areas of needed improvement and base partner identification upon organizations that can strengthen these areas.
  - ○ Maintain a variety of strong and weak, or loose, relationships with other organizations while considering the macro and micro contexts of partners.
  - ○ Ensure that CER has dedicated staff to cultivate and grow partnerships.

- ● <u>Fundraising expansion:</u>
  - ○ Maintain a current donor list and use it to identify regular or habitual donors.
  - ○ Develop a plan to expand beyond habitual donors through the board of directors' and current donors' networks.
  - ○ Focus prospective donor cultivation and fundraising efforts on the following stakeholders: board members, like-minded individuals who give to similar organizations, local businesses, philanthropic arms of corporations, granting agencies, and online fundraising campaigns.
  - ○ Identify funding partnerships with fellow FBOs, granting or philanthropic organizations, corporate donations, and federal support while prioritizing funding received from organizations that aligns with CER's mission and values.
  - ○ Identify prospective donors through networking with individuals who share a common interest as CER. This shared interest may include the geographic area CER serves, religious affiliation with CER, or the types of projects which CER conducts.
  - ○ Track measurable project outcomes while also communicating success stories made possible through CER's services.
  - ○ Share these outcomes and stories through a regular, concise, and easily digestible newsletter with donors.

- ● <u>FBO best practices:</u>
  - ○ Understand the role that FBOs play in the nonprofit sector and how to leverage faith-specific resources.
  - ○ Maintain stability through organizational leadership transitions while considering the role that faith plays in CER.
  - ○ Consider partnerships with other organizations that share the same values as CER.
  - ○ Develop a strategy of how to recruit, motivate, and acknowledge faith-motivated board members, volunteers, and donors.

Acknowledgements

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High Performing Organizations

This section provides a broad look at capacity building techniques for CER. These techniques include a broad overview of this report's research while tailoring suggested strategies to CER's specific needs and its existing organizational ability to implement changes. The material presented in this section represents research and analysis conducted in relation to project consideration one, and answers CER's question about expansion of organizational capacity.

In order to identify potential strategic issues facing CER, a Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis was conducted. A SWOT analysis is a useful tool for assessing the capacities of an organization because it provides a framework to consider the particular assets and drawbacks of an organization. It can also be used to analyze specific aspects of an organization. Conducting this SWOT analysis allowed the team to make use of its own guiding questions for this section, which drove the research and analysis for this project consideration:

- What are CER's strengths as an organization?
- What are CER's weaknesses and areas of potential improvement?
- What opportunities does CER have to leverage strengths and improve weaknesses?
- What threats does the organization face?

Results of the SWOT analysis are below, and a blank form is included in Appendix B.

Strengths	Weaknesses
- Existing partnerships in Nepal. - Volunteer base. - Experienced board members. - Specific goals and project costs outlined in budget; makes it easy to plan for. - Passionate leader. - Experience executing successful projects.	- Not many resource partnerships. - Budget document seems to present income that isn't very diverse. - Limited staff capacity. - Limited name recognition. - Limited engagement in fundraising. - Mission, values, and goals not clearly defined. - Limited social media reach. - Organization identity too tethered to the founder.
Opportunities	**Threats**
- Expanding partnerships in Nepal. - Creating a 'twin' organization in Nepal (see Capacity Analysis). - Utilize board to increase fundraising. - Expand diversity in the board; consider incorporating a former refugee? Or a member of the Nepalese diaspora? - Diversify revenue through a fundraising strategy. - Encourage employees, board, and volunteers to help shape CER's identity. - Leverage local youth engagement, universities, youth serving organizations, to expand volunteer base. Prioritize social media and branding opportunities.	- Covid-19 revenue loss. - Covid-19 volunteer opportunities lost. - Be careful to avoid 'white savior complex' when engaging internationally. - Organization identity could get too wrapped up with the passions of the founder. - Mission-creep: trying to take on too many projects in many diverse areas could leave the organization with scarce resources.

Based on the above analysis, three strategic issues were identified which are considered below.

Strategic Issue #1: Fundraising and Resource Growth

The first strategic issue identified for CER is in the area of fundraising and resources, including creating strategic partnerships to leverage resources. For example, CER currently has only three resource partnerships that it can leverage to aid in completing its projects and currently receives income from a limited, homogenous funding source. With projects in at least three geographic areas, having only three resource partnerships limits CER's ability to leverage the partnerships for its benefit; if one partner isn't available in an area, CER has no other options to assist it. This

area is a strategic issue because finances and resources are a key tool for any organization to deliver its services, and CER will be able to perform better and achieve long term sustainability if it can secure a diverse fundraising strategy and partnerships to share resources. These issues threaten organizational capacity and the organization's ability to achieve its mission, which aligns with one of the major considerations for this project.

Networking & Collaboration

Networking can be a tool that CER uses to increase capacity and increase access to resources. Since CER only has three resource partnerships to support it currently, engaging in methodical networking has the potential to enhance its capacity by giving the organization access to more resources while not investing the financial capital from the organization itself. Strong social network ties are relationships formed with individuals and other organizations with which one has frequent contact, engages in reciprocal favors or obligations, and has strong emotional intensity. Weak social network ties are those relationships that lack these attributes. The research conducted points out that the highest performing organizations have more weak ties than strong ties (Nelson & Matthews, 1991; Shumate, Fu, & Cooper, 2018). Maintaining strong ties requires the time and effort needed to participate in frequent contact and favors as well as the upkeep of the emotional bond between the organizations. Weak ties include groups that are not contacted as frequently, but with which one still has a close relationship. Not as much effort must be put into these relationships, but a large network remains accessible to activate when needed (Nelson & Matthews, 1991; Shumate, Fu, & Cooper, 2018). Despite the ease of maintaining weak ties, strong social network ties have their assets as well, such as the ability to ask for larger favors.

Twinning is a specific type of networking that has been successful for some organizations. Twinning is the practice of creating partnerships with similar organizations in developing countries to serve as a 'twin' organization. Twin organizations face similar challenges and are able to face them more effectively together (Jones & Blunt, 1999). CER currently has a person as a contact in Nepal, but Twinning could be an effective method for CER to use with an organization located in Nepal because it would allow CER to access more resources than one person can provide.

Recommendations for CER:

- Maintain a diverse and wider network of weak ties with organizations and limit strong ties that require significant organizational resources but do not produce significant beneficial outcomes. CER currently has several strong ties with organizations with which it has maintained relationships for decades, so CER should focus on increasing its weak ties.
- Consider limiting strong ties to organizations most aligned and similar to CER or organizations from which CER can most benefit. An example might be a strong tie with a

long standing robust organization with brand recognition and deep financial and volunteer resources.
- If implementing twinning:
  - Consider the macro and micro contexts of both partners, including system compatibility, pace and direction of governance reform, infrastructure, language, and so on;
  - Consider the track record of the incoming partner;
  - Choose an advisor for the program who is strategic and able to identify opportunities for mutual growth, and
  - Realize that without adequate attention paid to the partnership, CER may not see growth.
- Identify weaknesses in CER's resources as an organization; then, identify potential network partners in CER's geographic service area that have resources that CER would like to access or model. For example, the SWOT analysis identified fundraising and social media as weaknesses; CER can identify similar organizations for which these areas are strengths in order to learn from them. Create a plan to meet these organizations and establish relationships with them. This plan may include:
  - Attending the organization's events or meetings;
  - Requesting an informational meeting with the organization;
  - Proposing a collaborative event or project between CER and the organization.

Strategic Issue #2: Community Awareness and Brand Recognition

The second strategic issue identified for CER is limited community awareness of the organization. This was identified as a strategic issue because of the few local partnerships the organization has, the limited use of social media to expand CER's audience, and the limited strategies currently in use to expand CER's volunteer network. CER currently has 4 local organizations for partners, which means that it does not have many contacts to reach out to when it would like to utilize the relationships. Additionally, CER's social media presence is limited to Facebook, which restricts its potential audience. The use of strategic partnerships, volunteer strategies, and expanding to diverse social media platforms with a clear communication strategy can help increase brand awareness of CER in its community to ensure the local community gains familiarity with the organization's mission and outcomes. These strategies will be commented on later in the report.

Strategic Issue #3: Organizational Identity

Strategic issue three is the organizational identity of CER, specifically defining a clear mission and values statement and ensuring that CER has a sustainable organizational identity. Based on the research conducted, this report identifies several strategies that CER can use to enhance the development of organizational identity.

Staff Interactions & Organizational Identity

Organizational learning is an important part of capacity building. The organization must learn from past experiences so that it can improve in the future. Consider every experience to be a learning experience by consistently asking questions based on activities that CER conducts. These organizational learning moments will be captured within the memories of staff and volunteers, and can also be documented to be reviewed later on. Additionally, the organization's leader plays an important role in shaping this culture of learning. In one organization studied, the leader inadvertently created this atmosphere because they did not have the same expertise as their staff, forcing them to ask questions and creating an environment where the staff felt comfortable voicing their opinions and asking questions themselves (Jones, 2001).

Additionally, while the leader plays a big role in shaping the culture and identity of the organization, volunteers, board members, and other key staff members also play a role in this process. These members of the organization will have conversations and moments in which they engage in identity-work, which means that they are actively shaping their identity within the organization or the organization's identity itself (Johnson & Jian, 2017). This could include earmarked donations, revision and discussion of the organization's mission, or negotiating members' roles in the organization (Johnson & Jian, 2017).

These recommendations were selected for CER because in the documents reviewed and conversations had with members of CER, there was no indication that the organization currently has an intentional practice of reflecting on its projects. Even if projects are going well, improvements can always be sought, which is why it is recommended that CER implement a reflection process. Additionally, CER's current leader has played a large role in shaping the organizational priorities; for example, CER's work in Nepal exists because of the personal connection the founder has to that region, which illustrates the influence the leader has on CER. While having influence on the organization is not necessarily a negative, it has the potential to weaken the organization to the point where it cannot exist without that leader. Therefore, it is recommended that CER encourage staff and volunteers to engage in identity-work conversations.

Recommendations for CER:

- After a project, create opportunities for learning by asking questions such as "What did we learn from this experience?"
- Consider having a debrief session after a project with those involved to talk about what went well and what could be improved. Do not forget to take notes and consider how to implement feedback received.
- Consider documenting major takeaways from debriefing sessions to ensure the insight is retained. This information may also be used to make changes to projects, or even to create a guidance document for future projects.

- As a leader in the organization, create an atmosphere of learning by being inquisitive and giving subordinates opportunities to share their knowledge.
- Leaders: pay attention to when identity-work conversations are happening, and encourage open communication to discuss these topics.

Mission-Oriented Success

Bryson (2004) states that an organization's mission clarifies an organization's purpose, or why it should be doing what it does. A clarified mission statement can have significant organizational benefits, such as redirecting conversations towards organizational priorities and clarification of the purpose of work being done (Bryson, 2004). Mission statements should be short, no more than a page, in addition to being inspiring and spurring action. CER's mission statement should grow out of numerous conversations surrounding the following questions:

1. Who are we?
2. What are the basic social and political needs we exist to meet, or what are the basic social or political problems we exist to address?
3. In general, what do we do to recognize, anticipate, and respond to these needs or problems?
4. How should we respond to our key stakeholders?
5. What are our philosophy, values, and culture?
6. What makes us distinctive or unique?

CER should consider and discuss these questions, then assign one individual to be in charge of using the information to craft a draft mission statement for key stakeholders to review and provide commentary upon (Bryson, 2004). The literature does not specify what role this person should have in the organization, so CER can discuss as a group and assign whomever they see fit to complete this task. The purpose of this is that having only one person draft a mission statement will be more time efficient, and the group can comment on the draft later before agreeing on a final version.

After clarifying the mission, it can be used to help define organizational goals. The ability to measure progress toward goals is crucial to a developing organization. In order to effectively track CER's work, consider these recommendations for measurement (Sawhill & Williamson, 2001).

Recommendations for CER:

- Instead of trying to measure CER's mission, create a mission-oriented, quantifiable goal and measure progress toward that goal.

- Develop measurements that are simple and easily communicated to those unfamiliar with the organization.
- Use measurements to promote CER's success to stakeholders, partner organizations, and prospective donors and philanthropic organizations.
- Use measurements to inform management decisions.

In addition to the recommendations provided here, two frameworks for increasing organizational capacity can be found in Appendix A. These resources will be useful if CER wishes to take a deeper look at how it can increase its organizational capacity.

Fundraising

As a non-profit organization, CER is dependent on charitable giving from donors. Small organizations often do best when seeking regular smaller gifts from individuals and organizations that are either already affiliated with the organization, or have a common interest in what the organization is doing, and CER should consider this when developing a comprehensive fundraising plan. CER should keep in mind that 70% of all fundraising in the United States goes towards religiously affiliated organizations (Tempel, Seiler, & Burlingame, 2016), CER may wish to start with those closest to the organization, such as friends and members of affiliated churches, to establish more reliable support.

Recommendations for CER:

- Review the current donor list.
- Identify regular or habitual donors (see key terms) and the amount of funds given annually.
- Develop a plan to expand beyond habitual donors by using the board of directors' and donors' networks.

Outlined below are resources and recommendations for creating a fundraising strategy designed to solidify current fundraising efforts, and grow beyond the existing base of supporters.

Strategic Issue #1: Developing a Case for Support

Before an organization can solicit donations, it must have a clear and well developed case statement. The case statement articulates why the organization deserves support. The case is larger than the organization's financial needs and should incorporate the mission, vision, goals and objectives of the organization (Sargeant & Shang, 2017).

Each member of the organization needs to be involved in the development of the case statement. From the Chief Development Officer, or whomever is responsible for fundraising at the

organization, board members, and volunteers. By involving all of these stakeholders, the organization builds engagement and ownership among all members of the organization.

Below is an outline of the elements of a case statement. Some of the elements have been filled in using information provided by CER. As an organization, CER can use this grid as a starting point for creating a case statement that reflects the organization as it exists today, and where it desires to be in 5 or 10 years.

Case Component	Must Articulate	Cutting Edge Relief
Mission	Explains why the organization exists, rationale for what it does.	Help those in trouble and hungry (https://cuttingedgerelief.org/)
Vision	A clear, definitive statement of what the organization wants to accomplish, and what the world will look like once the organization has accomplished its mission (Drake, 2017).	To fulfill our commission through the demonstration of the love of Christ through acts of service and care. This is fulfilled through assisting with disaster relief, ministry of help to those in need, and making a difference in the lives of orphans and widows in their troubles.
Goals	The desired achievement that is expected to solve the problem.	
Objectives	What will be accomplished by reaching the goals.	
Programs and Services	What the organization actually does, including narratives from the people that benefit.	Three Nanny Goats Beekeeping Initiative Local disaster relief
Finances	What it costs to offer the programs and the need for philanthropy.	
Governance	Character and quality of the organization shown in volunteer leadership and governance (board members).	
Staffing	Qualifications and strengths of staff.	
Service Delivery	Advantages, strengths and effectiveness of mechanics of program and service delivery.	
Planning and Evaluation	Program and fundraising plans and evaluation that demonstrate organizational impact.	
History	Stories about the founders, staff, significant accomplishments and successes over time.	

Case statements can be crafted for specific audiences. Church members may respond to appeals that highlight the faith-based goals of the organization. Philanthropic organizations will be

interested in the impact of their gifts and if the project aligns with their missions and goals. Consider the audience and craft documents and appeals that will excite the prospective donor by including the following information:

1. State the need
2. Document the need
3. Propose strategies to alleviate the need
4. Identify who benefits
5. Demonstrate organizational competence
6. Specify resources required
7. Provide a way to make a gift
8. Explain the benefits of giving

Strategic Issue #2: Cultivating and Sustaining Existing Donors

The literature tells us that 70% of U.S. adults regularly make donations to nonprofit organizations (Klein, 2016). People choose to give for the following reasons:

1. Because they were asked by a trusted individual;
2. They receive a tax deduction;
3. To fulfill a religious obligation or belief;
4. Something is owed to the community;
5. Those who have more should give to those who have less (Sargeant & Shang, 2017).

For organizations to grow and thrive, it is critical to cultivate "donors" as opposed to "donations." Donors are key constituents who can grow the fundraising potential of an organization by building relationships, asking their networks to give, and promoting the organization. People give because it makes them feel good to give to an organization in which they believe, and it is important to ensure donors give again and again.

Donors have the potential to move along the following continuum adapted from Kim Klein's *Fundraising for Social Change* (2016):

Non Donor	New or Impulse Donor	Habitual Donor	Thoughtful Donor
Has not been asked to give to the organization, yet.	Receives initial ask in the form of an email, personal relationship, or mailer. Typically provides a small gift towards the annual fund.	Gives a regular donation on a schedule. The gift fits their budget, and may support special projects. These donors see themselves as part of the organization. Sharing the organization's ideals and vision.	Gifts for capital projects, endowments, or bequests. These donors consider what size gift adequately reflect s how much they care about the organization's work.

Organizations such as CER should have the following goals for each donor:

1. Reach the Thoughtful Donor level.
2. Get as many donors as possible to give to a capital/special campaign.
3. Encourage the donor to remember the organization in their will or estate .

On average, one-third of donors will not continue their contributions (Klein, 2016). For this reason, it is important to cultivate donor relationships beyond the initial gift through donor "upgrading" strategies.

1. Acquisition: identify initial impulse donors and encourage them to give again:
   a. The initial ask can be in the form of direct mail, emailed newsletter, social media, or a direct ask from a trusted individual connected to the organization such as a board member.
   b. Offer opportunities for supporters to form a personal connection with the agency through personal narratives or representations of those benefiting from CER's services in publications or social media posts.
2. Retention strategies to persuade the donor to give a second or third time:
   a. Personalized thank you notes for even the smallest gift.
   b. Follow up with a request for an additional gift.
   c. Recognize the impact of their gift.
3. Upgrading strategies
   a. Invitation to special events.

b. A personal solicitation.

Case Study: Companion Community Development Alternatives Fundraising for Capacity Building

Prior to 2014, Companion Community Development Alternatives (CoCoDA) did not have a strategic fundraising plan. The organization was reliant on donations from 13 individuals and approximately 80% of the organization's operating funds came from paying delegations to El Salvador. When a delegation canceled or an external event prevented delegations from traveling, such as the polar vortex in 2013, the organization was in a very dire situation. Jim Mulholland, a former board member, was asked to take on the role of Executive Director and initiate a strategic fundraising model designed to expand the donor base and reduce the reliance on delegation travel. The outbreak of the Zika virus in Central and South America in 2016 exacerbated the need to shift its funding strategy as delegations were cancelled and its primary source of funding dried up.

Steps Taken to Expand Fundraising Operations
1. Improve the database of past delegation participants and donors.
2. Focus on smaller, regular, donors that have the potential to grow over time.
3. Create opportunities for individuals and prospective donors to get involved with the organization through special events and other projects.

Results
- In 2021: 125 regular donors with an annual growth of 20 new donors.
- Donor gifts raise between $10,000-15,000 per year. If that growth continues, the organization will be fully able to operate on donations. Funds raised from delegations will be unrestricted and can be applied to any organizational need.
- Average gift per year is approximately $200.

Keys to Success
- 100% of the Board is engaged in fundraising activities.
- Focus energy on small donors. Limit requests for gifts to twice per year.
- Large granting or philanthropic organizations generally are not worth the effort unless there is a personal connection to the organization (J. Mulholland, personal communication, March 3, 2021).

Strategic Issue #3: Funding Sources

Many faith-based organizations receive the bulk of their funding outside of their faith community. FBOs may draw from multiple sources of support, including government funding (local, state or federal), secular foundations, corporate giving, endowments, and income from tuition or fees for services (Faith and Organizations Project, 2010b). It is important to have a

diversification of funding sources and not to rely heavily on too few donors. Changes in economic conditions can result in donors limiting their giving, and individuals who provide significant funds may have expectations the organization is not prepared to meet.

Recommendations for CER:

- Focus fundraising efforts by targeting the following stakeholders:
    - Board Members
    - Like-minded individuals who give to similar organizations
    - Local businesses
    - Philanthropic arms of corporations
    - Granting agencies
    - Online fundraising campaigns
- Identify funding partnerships such as other FBOs, granting or philanthropic organizations, corporate donations, or federal support. Only accept partnerships that align with the organization's mission and values.
- Identify prospective donors by connecting with people who have an interest in the area/region that the organization serves, or are interested in the types of projects the organization executes.
- Measurable outcomes are important, but the smaller donors respond to success stories made possible by the organization's services.
- Create an engaging and easily digestible newsletter to share with donors on a regular basis. CER's current newsletter is very text heavy and may provide more information a reader is willing or able to absorb. Consider using a template service such as Mailchimp similar to the one provide in Appendix D: Fundraising Newsletter from CoCoDA.

Strategic Issue #4: Identifying New Donors

Board members bring specific expertise, passion, and knowledge to an organization. However, they are also key partners in supporting fundraising goals for CER. Setting this expectation early is an important step in onboarding a new board member:

1. Board members must be willing to make a donation that is significant for that member.
2. Board members must be an active participant in fundraising in some way that is helpful to the organization (Klein, 2016).

In a recognized 501(c)(3) nonprofit organization, board members have legal responsibilities for the organization, and are chosen because of a willingness to take that responsibility seriously. Additionally, the behavior of the board in fundraising activities sends a message to potential donors and strengthens the fundraising case for the organization. If 100% of the board donates, it

is a signal to others that the organization has solid leadership and governance and is an organization worth supporting.

Board members expand the fundraising reach of CER by tapping into their own networks and developing prospects that meet the ABC's of donor prospects:

A. Ability to make a gift
B. Believe in the cause or something similar
C. Contact with someone in the organization who is willing to ask the prospect or allow their name to be used in the personal solicitation.

Building a Donor Prospect List: Board Activity

Ask each board member to identify a list of people they know and compare notes across the board:

Name of Board Contact:			
Person I Know	Believes in the Cause of CER?	Gives Away Money to Organizations?	Potential Amount to Ask for:

Then create a Master Prospect List:

Name of Prospect	Contact within CER	Who will Solicit	Amount of Ask	Notes

Divide the solicitation among the board members and keep records of encounters. This is also an opportunity to gather additional information, including the contacts of the prospective donor or the individual's intention to engage as a volunteer rather than a donor at this time.

Start the outreach process with individuals who are likely to make donations. This allows the solicitors to feel they are making progress and avoids early rejection as well as loss of momentum.

Case Study: CoCoDA Fundraising During a Pandemic

When individuals are unable to gather in person, organizations must rely upon digital and social media to communicate their message. Prior to the 2020 COVID-19 pandemic, CoCoDA would host an annual in-person event called the "Febrero Fiesta." The event was a traditional gathering opportunity for old and new friends of the organization to come together and provide support for CoCoDA programs in Central America. It would feature a silent auction of fair trade goods from Nicaragua and El Salvador, as well as gift baskets and experiences from local businesses. Due to the pandemic, the annual event needed to move to a virtual platform and be reimagined entirely.

The virtual program was spaced over the course of four evenings for 90-minute zoom meetings. Each evening featured a theme related to the work CoCoDA does in Central America: health care access, sanitation and water purification, solar power and sustainability, and education. Over four nights the organization engaged over 122 individuals in 5 countries, and raised $19,800, exceeding its original goal of $15,000.

The Executive Director, Jim Mulholland, was so thrilled with the outcome that he plans to offer the Fiesta virtually in the future. Aside from connecting with so many friends of the organization, CoCoDA was able to avoid the high costs associated with renting space in Indianapolis, paying caterers, and the limitation of inviting only local guests.

Faith-Based Organizations

CER seeks to expand its organizational capacity and legitimacy, the awareness of its organization, and develop and maintain a larger pool of volunteers and partners. FBO best practices will help guide CER through its goals. The following FBO best practices are analyzed here: organizational stability through periods of transition, board structure, partnerships, resource development, and volunteer recruitment and retention. The subsections in this part of the report address CER in the following ways:

- The role of FBOs in the nonprofit sector: evidence of the integral part that FBOs play in the nonprofit sector and that CER is part of this large and important field.
- Transitional strategies: advice for CER during the transition of leadership which will eventually take place in the organization in order to maintain organizational legitimacy and capacity. This advice can be begun immediately in the case of emergency circumstances which would force an abrupt shift in leadership.
- Board structure: best practices for sculpting a board of directors that strengthens an organization's capacity and awareness of the organization.
- Partnerships: guidance on partnering with other organizations in the effort to expand organizational capacity, organizational legitimacy, and awareness of the organization.
- Working with the US government: advice for potential of organizational capacity growth.

- Resource development: advice on strengthening CER's fundraising ability to increase its organizational capacity and legitimacy.
- Volunteer recruitment and retention: advice on strengthening CER's volunteer base to increase its organizational capacity and awareness of the organization.

The Role of FBOs in the Nonprofit Sector

FBOs play a growing role in the nonprofit sector as the government decreases its social services spending. These services are provided in both secular and non-secular ways. The importance of FBOs is the ability for these organizations to harness the power of people with common beliefs and similar commitments to a cause. However, FBOs are unique in the nonprofit sector in that they face the challenge of their stakeholders not wanting to provide services to all groups. They can be pulled between the service mission of the organization and the religious mission behind the organization (Cnaan & Milofsky, 1997). As an FBO, CER is part of this integral part of the nonprofit sector, facing several of the same challenges and benefits that other FBOs encounter.

The potential of FBOs to empower their stakeholders and to shape service provision is great. In the United States, "58% of congregations, containing 78% of attenders, participate in or support some type of social service program" (Chaves & Tsitsos, 2001, p. 668). However, some congregations dedicate their services more to certain areas than others.

In particular, food, clothing, and shelter are the common form of services. These types of services typically align with short-term congregational service activities that address immediate needs rather than long-term projects which involve more personal relationships between clients and congregations. FBO participants also engage in a variety of ways within short-term activities. For example, participants in food security programs make donations, volunteer in making deliveries with Meals on Wheels, coordinate food drives, and serve at food kitchens. This study suggests that volunteers prefer to conduct simple tasks in small groups on a regularly-defined basis (Chaves & Tsitsos, 2001).

The social class and denomination of a congregation also play a role in FBO volunteer participation. Lower-income areas tend to have higher volunteer participation in social service activities. Protestant and Catholic FBOs perform approximately the same amount of services while more liberal congregations participate more than conservative ones. Conversely, the race of a congregation does not seem to play a role in the types of services in which congregants volunteer (Chaves & Tsitsos, 2001).

Concerning international development organizations, FBOs play a significant role. Nearly 60% of international development organizations from the United States are FBOs. In addition, the least-resourced populations in the lowest-income nations seem to have more trust in FBOs than in secular relief organizations. However, attention must be paid to the specific religion of the

area being served. In Central Asia, Iraq, and Pakistan, Muslim Aid and Islamic Relief Worldwide possesed more trust amongst its service population than Christian FBOs while Christian organizations are thought to be more trusted in Christian Africa (Cnaan & Heist, 2016).

Cnaan and Heist (2016) claim that FBOs serving in Africa have the following advantages as opposed to secular organizations: longer-term commitment to the service community, association with other FBOs' work, they strive to abide by the "golden rule" (treat others as you want to be treated), and the experience with poor populations that will contribute to the will to lift others up to a better life. International funders and international organizational networks also trust FBOs (Cnaan & Heist, 2016).

The age group most likely to volunteer in international aid is 15-24 years, followed by individuals who are 55-64 years old. In addition, over 60% of volunteers working in international aid come from households earning $100,000 or more annually. Furthermore, nearly half of these volunteers were associated with an FBO (Cnaan & Heist, 2016).

FBOs represented the largest number of non-governmental international service organizations in 2013. In fact, of all international development organizations, 59% were FBOs. FBO funding typically comes from congregants' donations while secular organizations often receive government funding. This causes a perception that they are a part of the government which funds them. Private corporations often donate to international development organizations, but this may focus only upon geographic areas in which the corporations wish to develop their own business interests (Cnaan & Heist, 2016).

Concerning types of services provided, there are no obvious differences between those offered by FBOs and secular organizations. In addition, no obvious differences in service locations between FBOs and secular organizations are found in the locations served (Cnaan & Heist, 2016). However, most FBOs focus on their service work rather than missionary activities.

Recommendations for CER:

- For domestic activities, focus on in-kind donations such as food, clothing, and volunteer time.
- If CER has a low-income volunteer pool, communicate that the organization's programs are focused on social services.
- International activities may benefit from a partner organization with similar faith traditions in the community being served in order to build trust.
- Target volunteer recruitment toward the age groups of 15-24 and 55-64 years as well as upper-middle class households.

- Understand that the perception of FBOs being non-governmental or non-corporate funded organizations can be beneficial when gaining trust with service populations.

Strategic Issue #1: Transition Planning

Due to CER's small staff size and because Mr. Richardson holds many relationships with donors and volunteers, CER must prepare for the eventual departure of Mr. Richardson as well as plan for any emergency circumstances that would cause him to be unable to serve as its leader. Strategic leadership transitions in FBOs provide the opportunity for laying the foundation for the future of the organization. Sharing organizational information and considering its strategic plan for the future to understand what it means to exist as an organization are imperative for an FBO during a transition (Oak, 2017) or in preparation for an emergency transitional situation. Having this basis of understanding will maintain the organization's capacity and legitimacy during transitions because the organization will keep its focus on its purpose, maintain its current volunteers and donors, and instill the organization's purpose in the current stakeholders. CER must understand how its services relate to its faith community in the following ways:

- Will the connection to the congregation or volunteers exist during the transition?
- Will the organization lose capacity if a beloved or charismatic leader departs?
- Is the organization deeply tied to the congregation?
- If there are changes made in the new organizational leadership or collaborations with new entities due to the new leadership, will the volunteers stay in the program? (Faith and Organizations Project, 2010a)

Strategic planning must also regularly involve bringing stakeholders into the discussion about the organization's mission, goals, and objectives (Faith and Organizations Project, 2010a). Giving stakeholders a voice in strategic planning for transitional periods allows the organization's community to feel that they are a part of the organization and its values (Faith and Organizations Project, 2010d). Stakeholders may be asked the following:

- How is the organization relevant and to whom?
- Which programs are still relevant and which are no longer relevant?
- Have new needs emerged that should be addressed by the organization?
- Are funding sources secure or are they expected to change?
- Are there potential collaborations or competition in the organization's environment? (Faith and Organizations Project, 2010a)

It is also important to involve stakeholders in the hiring process of the new organizational leader. This involvement may take the form of including stakeholders in the search committee, requesting their feedback on candidates, or even keeping them closely informed of the hiring process. Involving stakeholders is important in any organizational transition, but it takes on a

specific importance in FBOs because stakeholders must be assured that the new organizational leader's faith aligns with the stakeholders' faith (Faith and Organizations Project, 2010d).

The hiring process should not be rushed and an interim director can be appointed if necessary. While hiring a new organizational leader, there are several considerations that should be observed.

- Should the leader be a member of a certain religious denomination? This may be required by the organization's articles of incorporation or bylaws.
- What experience and skills should the leader possess?
- Does the leader's vision align with the organization's mission? (Faith and Organizations Project, 2010d)

Once a leader has been selected, the way in which the leader is incorporated into the organization requires an intentional choice. A leader may be trained by their predecessor so that they may effectively learn how the organization is run. However, it may be preferable to allow the new leader to learn independently in order to establish a separation between the former leader and the successor. This approach permits the new leader to implement their own leadership style in a more independent manner. Regardless of the chosen approach, the transitional process of an FBO must align the new leader's values with the values of the FBO's current stakeholders (Faith and Organizations Project, 2010d).

While selecting a new FBO leader, it is important to consider what will be best for the stakeholders of the organization. The University of Maryland's Faith and Organizations Project (2010d) recommends that FBOs allow a greater distribution of authority and delegation of smaller projects within the organizational structure so that when a leader is replaced, the bulk of the organization's knowledge will not leave with the former leader.

Case Study: Organizational Stability Through Periods of Transition

Reverend Dr. Carol Pinkham Oak's story about the organization that she used to lead, which she keeps anonymous, spreads the transition over three years (2017). Before telling the board of directors about her decision to leave, she prepared the board with critical information. Organizational information was shared with the board in the monthly report, including the staff members' roles, compensation norms in the field as compared to the organization's, and the board of directors' role. Oak was sure to provide the organizational budget to the board, detailing current financial resources, planning for staff salaries, and projection of physical plant upkeep. Importantly, she focused on the history of the congregation and honored its previous leaders and donors. Finally, in the third year of planning, Oak began telling church leaders and planning within the leadership team (Oak, 2017). This transition of passing institutional knowledge on to

the board before making the announcement to leave put the board in a good position to be partners in the planning process for the organization's future.

Recommendations for CER:

- Ensure that the ties to donors and volunteers will continue after the new leader has taken over.
- The organizational leader must share critical organizational information with the board of directors; including organizational budget, staff compensation that will be necessary after the departure of the organizational leader, operational expenses concerning the upkeep of buildings, rent and utilities, and the staff member roles that will take the place of the organizational leader.
- In anticipating a leadership change, provide a long runway and communicate intentions as early as possible.
- Allow the board and other stakeholders to be involved in identifying the new organizational leader.
- Ensure that the new leader's values align with the values of the organization.
- Consult CER's constitution and bylaws before choosing a new leader.
- The departing leader must communicate the endorsement of the new leadership to allow for continuity of stakeholder engagement.
- Distribute authority and delegate smaller projects within the organizational structure:
    - Ensure that the Treasurer, as head of organizational finances, can independently complete CER's financial statements and IRS reporting requirements without the aid of the organizational leader.
    - Train the board chair in how to onboard and train new board members.
    - If board members are not already part of CER's programs, involve them in organizational service projects by introducing them to volunteers, inviting them to attend and co-lead volunteer trainings, bringing them to on-site projects where they can help direct volunteers, and giving their contact information to volunteers so that they can be a resource for volunteers' questions.
    - Introduce board members to donors so that they may develop relationships.
    - Invite highly involved and experienced volunteers to participate in volunteer training sessions and to supervise fellow volunteers in on-site projects.
    - Introduce highly involved and experienced volunteers to donors so that they may develop relationships.
- Several of these recommendations can be implemented immediately to prepare for an emergency which would necessitate an abrupt change in organizational leadership, including: sharing information and delegating responsibilities to the board, strengthening relationships between board members and donors, involving highly dedicated volunteers

in program training and supervision, and strengthening relationships between highly involved volunteers and donors.

Strategic Issue #2: Board Structure

The board of directors of an FBO significantly contributes to the strength of the organization. For example, the board members of United Way of Delaware, Henry, & Randolph Counties are on the board in order to serve a beneficial purpose to the organization. One of the board members is the head of Ball State University's major labor union and another is Ball State's Provost and Vice President for Academic Affairs (United Way of Delaware, Henry, & Randolph Counties, 2021). Ball State is one of the largest employers in the area and provides many volunteers as well as a large amount of donations. Maintaining a relationship with Ball State through its board members gives this United Way an avenue for connecting with potential volunteers and donors.

CER has chosen board members which strengthen its relationship with the faith community, add valuable program and business knowledge, and possess expertise in fundraising. When selecting board members, CER should continue to consider the following factors:

- The organization's mission and the board members' understanding and dedication to this mission
- The organization's strategic plan
- The purpose of the board: fundraising, community partnerships, expertise in finance, law, or programming initiatives
- The amount of diversity amongst board members
- The religious denomination of the members
- The amount and type of involvement of board members in the organization (Faith and Organizations Project, 2010a)

Board members should contribute through their talents and involvement while bringing different perspectives and knowledge to the organization. They should also have a thorough understanding of the FBO's mission and take part in its programs. It could be beneficial to recruit board members from the organization's volunteers so that they already have this understanding and level of participation (Faith and Organizations Project, 2010c).

After board members are selected, training sessions should take place. The Faith and Organizations Project at the University of Maryland (2010c) recommends monthly meetings involving information sessions as well as yearly board retreats. During this training, an emphasis should be placed on informing the members of the stakeholders' expectations of the organization's board. Educating the board about programs is essential, but the focus should always be brought back to the reason for the programs and the organization's mission (2010c).

Lastly, the board should be instructed on how to regularly communicate with the organization's stakeholders. This can done in the following ways:

- A regular board report addressed to stakeholders
- Question and answer sessions between board members and stakeholders
- The board should request annual reports on the organization's programs (Faith and Organizations Project, 2010c)

Within all of these activities, the board should always return to the organization's mission. The members should communicate how their activities relate to the mission and they should ask the stakeholders how their activities contribute to the mission as well (Faith and Organizations Project, 2010c).

Recommendations for CER:

- Continue to recruit board members based on the benefits they provide to the organization. CER should consider recruiting board members with knowledge of nonprofit finance and law as well as more individuals who are highly involved in major local workplaces, as CER has already done with Cornerstone Television.
- Consult CER's constitution and bylaws before inviting new board members.
- Ensure board members are committed to CER's mission before inviting them to serve.
- Recruit a diverse body of board members from a variety of backgrounds; organizational volunteers or clients can provide imperative insight to the organization.
- Provide onboarding to new board members.
- Set expectations for responsibilities and engagement early.
- Remove board members who are unable or unwilling to commit to the established expectations.
- Communicate board activities to stakeholders regularly.

Strategic Issue #3: Partnerships

In order to expand their organizational service capacity and legitimacy, FBOs may decide to partner with a variety of organizations. However, FBOs are unique in that they must consider not only whether to partner with organizations that share their same service projects, they must also choose whether or not their partners share their faith. Many FBOs form collaborations. In fact, 84% of congregations in the United States that provide social service programs participate in collaborations. Of these congregations, 59% partner with secular organizations and 58% with other religious organizations (Chaves & Tsitsos, 2001).

CER already has important partnerships which contribute in-kind resources and volunteers to the organization. CER may consider partnering with an organization in Nepal that serves regions

which it does not yet serve in order to expand its geographic reach and program capacity. It may choose a partner which shares its faith or which is secular. Regardless of this factor, the partner's goals and values should align with those of CER.

World Vision Nepal is an FBO that performs various programs to fight poverty, including providing shelter and clean water. It collaborates with fellow FBOs to help it deliver services in several Nepalese regions (World Vision, 2021). Since CER already partners with World Vision in Pittsburgh, it could reach out to World Vision Nepal to collaborate on its programs there, such as the Three Nanny Goats Program. Since World Vision Nepal serves several regions and has an established reputation in Nepal, this partnership could expand CER's service area of its programs while strengthening its legitimacy by associating itself with World Vision Nepal's existing reputation.

While partnerships are common in FBOs which provide social service programs, collaborations do not come without risks. Organizations which grow due to partnerships or which completely merge with other organizations risk "bureaucratization". This term describes the standardization of organizational processes and contributes to a furthering of an organization from its original faith-based beginnings. Bureaucratization may lend legitimacy to an FBO in the eyes of stakeholders, including donors and program recipients. Conversely, other stakeholders, specifically volunteers, may be opposed to the more standardized practices of the organization (Faith and Organizations Project, 2010a).

An FBO's mission and organizational foundation must be considered when forming partnerships to avoid the alienation of stakeholders. The bylaws often serve as strong guidance on an organization's procedures and should be consulted as well before partnering with another organization (Faith and Organizations Project, 2010c).

Recommendations for CER:

- Continue to identify partnerships which will allow CER to strengthen its service delivery capacity.
- Identify partnerships which will enhance CER's reputation and legitimacy.
- When choosing a partnership, ensure the partner organization, whether faith-based or secular, shares CER's values and goals.
- Consult CER's constitution and bylaws before choosing partners.
- Regularly review partnerships for effectiveness.
- Use CER's faith to create partnerships with organizations that may not be geographically close, when appropriate.

Strategic Issue #4: Working with the U.S. Government's Faith-Based Initiative

One type of partnership available to FBOs is with the federal government. It is not recommended that CER undertake a partnership with the government's faith-based initiative at this time due to the large amount of required reporting to the government as well as the specific and numerous rules by which an organization must abide (White House, n.d.). However, this report's section is provided in case CER encounters this type of partnership while working with another FBO.

The White House Office of Faith-Based Community Initiatives and Centers for Faith-Based and Community Initiatives in five federal government agencies were formed to encourage government funding of FBOs that provide social service programs. If states receive federal funding meant for social service providers, FBOs may apply for this funding without being required to change their religious practices. Some funding has even been created for which only FBOs may apply (Chaves & Tsitsos, 2001). Many of the federal government's agencies have specialized staff who focus on helping FBOs apply for and manage government funding, some of it at no cost (White House, n.d.). However, this initiative requires an organization to serve all clients, regardless of religious affiliation (White House, n.d.). If an FBO would rather not serve a population due to its religious beliefs, it must still serve this population if receiving federal funding.

Recommendations for CER:

- Before engaging in this partnership, CER should ensure it has the staff capacity to support the reporting requirements and abide by the funding requirements.
- Ensure CER's values are in alignment with any potential projects funded through this initiative.

Strategic Issue #5: Resource Development

In terms of other types of funding and resources, FBOs often rely upon in-kind donations and volunteers (Cnaan & Milofsky, 1997) as well as monetary donations from the faith-based community (Faith and Organizations Project, 2010b). Maintaining and recruiting new donors will permit CER to expand its monetary and in-kind resources, which will lead to an expansion of its organizational capacity through the amount of services that it can offer. Resources from the faith-based community are often a particular strength of FBOs as opposed to secular nonprofits for a number of reasons, including:

- Involving volunteers and in-kind donors pulls these individuals into the organization's faith-based mission and includes them in the faith's community.
- Monetary donations can come from religion-specific foundations.
- Faith-based connections with community members may attract specific in-kind donations, such as food or clothing drives, vehicles, office supplies, and location space.

- Volunteers within the faith community may include lawyers, accountants, and grant writers who can provide in-kind skills to the organization (Faith and Organizations Project, 2010b).

Drawing upon shared beliefs and values encourages community members to engage in the organization's mission and to make personal connections with fellow faith community members. These connections will contribute to the legitimacy of an FBO and its reputation in the community. These factors will lead to word-of-mouth marketing and greater notice of an organization to donors. As an FBO involves members of its faith community, it will receive more resources and more exposure.

In order to involve more members of its community, an FBO may:

- Recruit members of its faith to participate in fundraising events and to tailor these events to the sentiments of members of the faith community while highlighting the needs that the organization addresses.
- Continue to maintain a donor database which includes past, current, and potential donors as well as other types of funding. This database should be continually managed to ensure that the sources of revenue align with the organization's mission.
- Recognize donors through events which not only serve to thank donors, but to also showcase the ways in which the organization serves the community, how it can further serve the community, and encourage further involvement in the organization.
- Recognize donors in a way which establishes a personal connection with the organization. For example, in exchange for a donation, individuals may have their names engraved on a stone in the organization's building. CER's current practice of sending donors pictures of nanny goats and placing their names on a water tap that they helped fund are strong recognition practices.
- Conduct informational sessions which educate the community about how donors and volunteers may engage in the organization (Faith and Organizations Project, 2010b).

While CER already maintains a donor spreadsheet, it should consider adding information that tracks how many years donors have given, in which years they have given, and whether the donor has been thanked or not as well as how they were thanked (thank you card, at an event, a gift, etc.). It is useful to indicate whether a donor wishes to remain anonymous and whether or not they would like to receive correspondence from CER, such as newsletters and thank you messages. In addition, the donor spreadsheet should include specific donor information which includes updated contact information, how donors prefer to be contacted, and their titles. For example, CER indicates that one of its donors wishes to be addressed as "Dr.". It is recommended that the spreadsheet also specify if a donor wishes to be addressed as "Ms." or "Mrs." (Lesem and Prine, 2016). These details will tailor CER's communications to donor needs

and make their experiences with the organization positive. If donors have positive experiences, they may also spread CER's good reputation to other donors by word-of-mouth, which will lead to more fundraising capacity, more awareness of the organization, and legitimacy amongst donors as well as potential donors.

An FBO may also find it useful to remind donors that they improve their own community through their support of the organization. Not only do they help provide aid for the community as a whole, they also support participation in faith-based activities and are part of the strengthening of their faith community. If the FBO provides secular-based services, it is important to communicate to donors that their faith is what motivates the work and that it still fulfills a faith-based mission (Faith and Organizations Project, 2010b).

Finally, it is imperative for FBOs to consider the sources of their funding and to ensure that they come from a variety of resources. For example, if an organization relies upon funding obtained through connections made by staff or board members, the organization does not want to lose these donors when the staff or board members depart from the organization (Faith and Organizations Project, 2010b). Using the involvement techniques described above, an FBO should work to develop sustained relationships with the organization's mission to tie their support to the organization as a whole instead of to one individual (Faith and Organizations Project, 2010b).

Recommendations for CER:

- Request monetary and in-kind donations through CER's faith community.
- Leverage resources from within the faith community.
- Recruit donors through events and service experiences.
- Add detail to and regularly manage the donor spreadsheet.
- Thank donors through events and other creative and personal methods.
- Remind donors that they improve their communities as well as serve their faith.
- Ensure that funders have relationships with individuals in the organization who will remain during organizational transitions.

Strategic Issue #6: Volunteer Recruitment and Retention

CER already has a strong body of volunteers from the faith community which allows the organization to provide its services. In fact, dependence upon volunteers is common among many FBOs that provide social services. Half of all FBOs conduct social service programs with the help of volunteers (Cnaan & Milsofsky, 1997). As an FBO, CER is in a unique position to interact with volunteers due to their shared belief system. Volunteers at FBOs often volunteer to give them a sense of belonging and accomplishment as relates to their religious beliefs (Cnaan & Milofsky, 1997). Even though many FBOs are not able to support a full-time volunteer manager

(The Urban Institute, 2004), the effort put forth by various FBO staff and the board of directors is very valuable in engaging volunteers.

The following factors should be taken into consideration when working with volunteers in order to give them positive experiences (Coleman, 2017). When volunteers have positive experiences, they are not only working at programs which expand organizational service capacity, they may also communicate through word-of-mouth to recruit other volunteers. This serves to increase awareness of the organization as well as legitimacy among potential volunteers and in the faith community.

Motivations

The first factor to consider when working with faith-based volunteers is their motivations. The University of Maryland's Faith and Organizations Project (2010e) mentions the following motivations:

- Answering a call to serve
- Fulfilling religious beliefs
- Following the example of Christ
- Maintaining faith
- Showing gratitude to God
- Acquiring skills and experience
- Spending time with friends

These motivations will be considered throughout nearly all of the following steps of the volunteer process: recruiting, screening, training, evaluating, feedback, and thanking. It should be noted that some of these steps will repeat throughout the lifetime of a volunteer and that on-going training as well as repeated evaluation, feedback, and thanking are valuable (Coleman, 2017).

Recruiting

Volunteers may be recruited in a variety of ways. Some of the most common include:

- Word-of-mouth and recruitment by friends
- Organizational newsletters
- Organizational website and social media
- Organizational information sessions
- Community outreach events (Faith and Organizations Project 2010e)
- Announcements at church (Coleman, 2017)

Coleman (2017) notes that organizations often state their needs up front and share how many volunteers are needed for the project. Making announcements at church is effective, but many organizations find the most success from board members and staff asking individuals directly to volunteer.

Screening

FBOs vary greatly in the type and amount of screening of volunteers. Some do not screen volunteers at all. Instead, organizations find that their existing relationship and knowledge of individuals are sufficient. However, many organizations perform background checks, especially concerning programs that involve children. Some organizations interview individuals before allowing them to volunteer, asking them about prior experience or observing their behavior at the program. Other organizations simply require that an individual be a member of their congregations (Coleman, 2017).

Training

Giving an orientation and training for volunteers will help to set them up for success. This process helps them understand the organization's expectations in addition to the purpose and mission of the program. Some organizations also provide on-the-job training as they begin volunteering (Coleman, 2017). In addition to volunteer duties, training also provides a space in which the FBO may communicate other expectations. These expectations may involve how to represent the organization pertaining to its religious guidelines, including dress code, limitations on proselytization, and interacting with volunteers and clients of different faiths (Faith and Organizations Project 2010e).

Evaluating

Coleman (2017) finds that FBOs have formal and informal evaluation processes. Informal activities include organizational staff speaking casually with volunteers over the phone, in-person, and through email. These occasions typically served to answer questions and reach out to volunteers to seek their questions. Formal activities include staff filling out forms which describe volunteer performance and discussing volunteers during meetings. Overall, most organizations do not seem to have a formal evaluation method.

Feedback

Organizations also offer feedback in a variety of formal and informal manners. Some FBOs contact volunteers periodically or immediately after a large event to seek out feedback while some organizations have a feedback button on their website where volunteers can write a message whenever they want (Coleman, 2017).

In addition to feedback from the organization, Coleman (2017) recommends that volunteers give feedback to each other. By encouraging this sharing of information, volunteers are more likely to

feel empowered to serve as mentors to their fellow volunteers. Volunteer managers are also important mentors who motivate their volunteers by granting them responsibility in the program as well as promoting and representing their shared faith (Coleman, 2017)

Thanking

In secular organizations, volunteers can be provided with internal and external rewards. FBOs can also provide these two types of rewards as well as eternal rewards (Coleman, 2017). These types of rewards are defined as:

- Internal: self-fulfillment gained from serving others
- External: rewards, gifts, and honorary events
- Eternal: satisfaction of serving their religious mission (Coleman, 2017)

Internal rewards can be provided by regular positive feedback from organizational staff and fellow volunteers while external rewards can be provided through small tokens of appreciation or recognition at formal events. However, eternal rewards are particular to FBOs because the organization may incorporate a volunteer's faith into these rewards (Coleman, 2017). Positive feedback could include speaking with a volunteer about how they feel that their contributions to a program are in service to their religion and a small token of appreciation could be a cross or religious image. Eternal rewards should be met for each volunteer on the basis that some individuals may be more willing to share their religious fulfillment in their work than others. Volunteers who may feel uncomfortable speaking about the topic may appreciate a small token more (Coleman, 2017).

Recommendations for CER:

- Understand volunteers' motivations and how they relate to CER's services.
- Determine effective volunteer recruiting strategies. Ask volunteers and congregants to bring a friend to all service and resource development events. Collect contact information and follow up with the new contacts with an invitation to stay involved.
- Screen, train, and evaluate volunteers. Provide training prior to all volunteer events. Consider this an opportunity to introduce the organization to new volunteers.
- Provide regular feedback and thank volunteers, through formal and informal methods.
- Empower volunteers to give feedback to their peers.
- Identify highly motivated volunteers and create specific roles for those individuals to fill a need in the organization. Leverage their unique skills to expand their engagement and CER's organizational capacity.
- Thank volunteers by fulfilling their internal, external, and eternal motivations. Recognize long-serving and highly effective volunteers in publications or public spaces.

Methodology

The following describes the amount and type of data, case studies, and recommendations in this report.

High Performing Organizations

The methodology for the High Performing Organizations section included a literature review of relevant peer-reviewed articles about nonprofit capacity building, high performing organizations, and best practices for nonprofits. After identifying 30 relevant articles, 20 were read and reviewed for information relevant to CER. We determined information relevant to CER if it pertained to a similar organization type, was targeted toward solving the same type of issues expressed by CER, and included actionable recommendations that were feasible to CER. After analyzing the 20 articles, the most pertinent information was distilled and provided here as useful strategies. In addition, we also reviewed the book 'Strategic Planning for Public and Nonprofit Organizations' by John Bryson and included some material from it in this report.

For the SWOT Analysis, our team referenced information provided by Mr. Richardson about CER through written documentation as well as interviews conducted. We used these resources to identify the key areas that we believe most need to be addressed for CER to achieve its goals and long term stability.

Fundraising

Fundraising research included a literature review of best practices for nonprofit fundraising. Fourteen publications were reviewed with a selection of five relevant sources. The sources selected focused on guidance in establishing a fundraising strategy, actionable steps, and supporting data. Additional information was sourced through an interview with the executive director of a small NGO focused on international development. The interview focused on how the organization, Companion Community Development Alternatives (CoCoDA), established a fundraising growth strategy.

Case Study: CoCoDA

The researcher selected CoCoDA as an example organization due to the researcher's knowledge of the organization after a multi-year collaboration. Over the 14 year partnership, the organization has grown from a small operation with a singular passionate leader, to a thriving NGO with clear strategies and outcomes to demonstrate to their stakeholders.

Prior to the arrival of Jim Mulholland, the executive director, CoCoDA was extremely reliant on annual service delegations from higher education institutions with personal connections to the organization. The organizational structure did not allow for growth and was limited in its capacity to effect meaningful outcomes for the communities it served. In 2021, even during a global pandemic, the organization is still able to engage its donors and commit resources to the

communities it serves because of a clear mission statement and focus on who it serves and how. While CER is a faith-based organization, there are many parallels between CER and CoCoDA, especially in the early days of the organization. Although the recommendations shared by CoCoDA may not always be appropriate for CER to implement, the example of how to grow a donor base and build capacity through clear focus can be useful for the organization to consider.

Faith-Based Organizations

FBO research included a literature review of academic articles, government resources, and think tank reports. Twenty-one sources were identified and reviewed, resulting in the selection of thirteen pertinent sources. Articles and reports were deemed pertinent if they dealt primarily with FBOs and international FBOs. In addition, sources were only selected if they focused upon key areas that addressed the expansion of CER's organizational capacity and legitimacy, its volunteer force, and the awareness of CER as an organization.

Case Study: Reverend Dr. Carol Pinkham Oak's Organization

This case study was selected because it describes a gradual and successful leadership transition in an FBO. Reverend Oak led the organization for several years and describes the process of her departure, although she keeps the organization's name anonymous. The steps she took to ensure the steady transition from herself to the organization's next leader is a detailed account that reflects upon both the administrative tasks and personal decisions which led to a successful transition of power.

Limitations

In the course of this report, several limitations were encountered and should be mentioned. First, since FBOs are not required to register with the Internal Revenue Service, complete data concerning these organizations is difficult to obtain. Furthermore, incomplete information on international FBOs exists because there is a lack of studies conducted concerning these entities.

Additionally, the recommendations offered for high performing organizations were made based only on the information available as provided by CER, but there are additional contexts and sources available to those within the organization. Before implementing any of the strategies recommended, CER staff should thoroughly consider their knowledge of the organization to determine if a method is appropriate. Further, as specific resources for international FBOs is difficult to attain, the strategies provided for CER may have come from a study of a different type of organization, increasing the need to consider CER's context before moving forward. Lastly, information about board of directors financial contributions or fundraising activities for CER was not made available.

Appendix A

Two Frameworks for Capacity Building

Frameworks are tools to help organizations or teams organize and visualize the steps you need to take to achieve something. These two frameworks for capacity building could be useful tools for CER in taking action toward increasing organizational capacity.

*Framework for Addressing Nonprofit Capacity Building*

1. Determine the basic needs and assets of the community served.
   a. Conduct surveys, focus groups, town meetings, individual interviews, or look at community indicators. Don't assume you know their needs.
2. Assess the number and types of nonprofit organizations in the community through mapping.
   a. Provides a framework for identifying potential gaps in service.
3. Identify the infrastructure that can be used to build your capacity.
   a. Are there regional associations to help distribute resources?Are there management support organizations? Are there potential partnerships to be had?
4. Select appropriate capacity-building strategies.
   a. Determine the type of capacity building that is most needed. For example: technical assistance, fundraising, accounting systems, marketing activities.
5. Monitor and assess progress on a periodic basis.
   a. Make changes if a strategy is not working out (De Vita, Fleming, & Twombly, 2001).

FIGURE 2   A Framework for Addressing Nonprofit Capacity Building
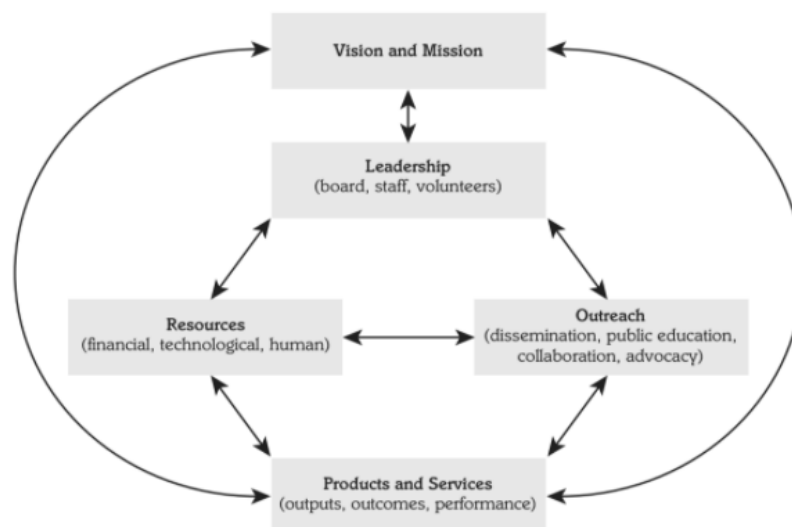
The Capacity Framework

This framework considers capacity as a pyramid consisting of building blocks (systems and infrastructure, human resources, and organizational structure) and high-level elements (aspirations, strategy, and organizational skills). This framework emphasizes the fact that each element must be considered individually and in relation to the other elements.

EXHIBIT
CAPACITY FRAMEWORK
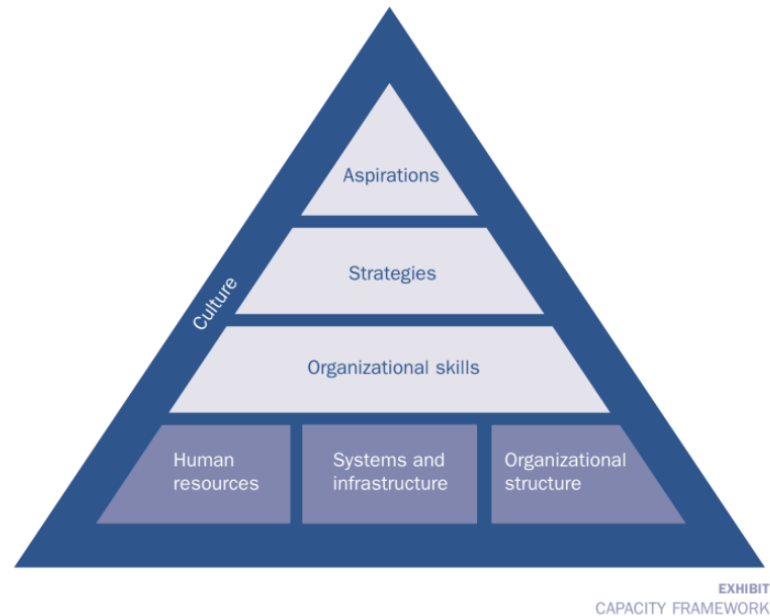
The definitions of each element:

- Aspirations: An organization's mission, vision, and overarching goals, which collectively articulate its common sense of purpose and direction
- Strategy: The coherent set of actions and programs aimed at fulfilling the organization's overarching goals
- Organizational Skills: The sum of the organization's capabilities, including such things (among others) as performance measurement, planning, resource management, and external relationship building
- Human Resources: The collective capabilities, experiences, potential and commitment of the organization's board, management team, staff, and volunteers
- Systems and Infrastructure: The organization's planning, decision making, knowledge management, and administrative systems, as well as the physical and technological assets that support the organization (Jonas & Morino, 2001)
- Organizational Structure: The combination of governance, organizational design, interfunctional coordination, and individual job descriptions that shapes the organization's legal and management structure

- Culture: The connective tissue that binds the organization together, including shared values and practices, behavior norms, and most importantly, the organization's orientation toward performance.

Appendix B

Blank SWOT Analysis

The group conducted a preliminary SWOT analysis based on resources provided by CER to the group. This SWOT may be incomplete as the group is not a stakeholder of the organization. However, the group feels this is an appropriate starting off point, and may be useful if CER decides to undertake this activity. Provided here is a blank table for a SWOT analysis CER may wish to conduct with its internal staff.

Strengths	Weaknesses
Opportunities	**Threats**

Appendix C

Companion Community Development Alternatives (CoCoDA): Case Study

Website: https://www.cocoda.org/

Mission: CoCoDA is a nonprofit organization devoted to the mission of cooperating in projects for democratic, community-based social and economic development in Central America, and promoting awareness and social responsibility in the United States for more just relations with Latin America.

Values:
1. Grassroots Organizing and Ownership
2. Fiscal Responsibility
3. Relationship Building
4. Sustainability
5. Ethical Engagement
6. Cultural Sensitivity

Goals:
1. To build such strong relationships between the people of the United States and Central America that the United States will never again subsidize the oppression of Central Americans.
2. To help rebuild the communities and infrastructure destroyed by United States dollars during the Salvadoran Civil War and Nicaraguan conflict.

Founded in 1992 after the signing of the Peace Accords in El Salvador after a brutal civil war, the mission of CoCODA is to create the relationships necessary to avoid US sponsorship of another conflict and repair the damage done by US dollars. Central to this commitment is working in collaboration with Salvadorans, who have identified several priorities. Housing is badly needed. Clean water is vital. Education and schools are essential. Help in securing land titles is necessary. CoCoDA combines its resources with those of Salvadoran organizations and communities in seeking solutions to these issues.

Organizational Structure: Hiring individuals in Central America satisfies two goals of the organization: Fiscal responsibility and investment in the communities it serves.

- Executive Director (US Based)
- Communications Director (El Salvador)
- El Salvador Program Director (El Salvador)
- Nicaragua Program Director (Nicaragua)
- Consultant (US Based)

Appendix D

Fundraising Newsletter from CoCoDA (Case Study)

2021 Febrero Fiesta Is Huge Success!

Jim <info@cocoda.org> Wed, Mar 24, 2021 at 7:59 AMReply-To: Jim <info@cocoda.org>
To: amandabrookinsblinn@depauw.edu

Connecting communities to communities and people to people

THANK YOU!

CoCoDA NEWSLETTER   MARCH, 2021

CoCoDA WEBSITE

2021 Febrero Fiesta Is Huge Success!

In one of the few silver linings of the pandemic, CoCoDA canceled its traditional Febrero Fiesta fundraiser and held a virtual event during the last week of February. In almost every way, this four night virtual event exceeded our expectations.

We raised $19,600, far exceeding our goal of $15,000.

We also connected with 122 people, including 27 new friends to CoCoDA, from over 20 states and five countries.

Special thanks to our four event sponsors!

More importantly, the four nights of lively interviews and beautiful videos allowed CoCoDA to provide over three hours of information about our projects and initiatives in public health, sanitation, water purification, solar powered water systems and education. You can view these videos on the CoCoDA You Tube page.

Muchas gracias to Karilyn Vides for three months of videotaping, writing, collecting pictures, editing and video production and to Jason Burk for handling our technical work.

Sun and Water Conference Registration Opens

CoCoDA and the Rotary Club of Danville, IN Proudly Present

The Virtual 2021 Central American Sun and Water Conference
April 17-18, 2021

A virtual gathering of Central American community leaders and North American supporters to explore the incredible potential of using solar power to bring clean, affordable and sustainable water to rural Central Americans.

On April 17-18, 2021, CoCoDA and the Rotary Club of Danville, IN will be hosting a virtual Sun and Water Conference. The conference will allow North Americans and Central Americans to interact over a two-day weekend and explore the

possibilities of using solar power to bring water to over 4000 people in the next twelve months.

Participants will attend two

The walk of death is an extremely dangerous path formally used by the women of Aguacayo, El Salvador, to obtain water.

In addition, two communities will present shovel ready water projects.The goal of the conference is to raise about $120,000 to fund these two large solar powered water projects with a construction goal of early 2022. Those interested in

workshops on solar powered water systems, a panel discussion of Central American community leaders, video tours of the Zacamil Dos solar powered water system as well as a virtual tour of "the walk of death."

registering for the conference can do so at the following link. Leaders from Rotary Clubs, churches, universities, foundations, and other service organizations are encouraged to register and attend.

For a fuller description of the conference, click here.

CoCoDA During A Pandemic

In 2021, the work of CoCoDA continues even during a pandemic. Though we will not be taking delegation back to Central America until 2022, here is a brief survey of the work we are still doing:

Speakers Bureau

In fulfilling our mission to connect North Americans and Central Americans, CoCoDA has been offering lectures, presentations, and interviews through our Speakers Bureau. So far we collaborated with Indiana University, Goshen College, DePauw University, West Valley Unitarian Universalist Church, University of Missouri KC and Guilford College.

Continuing Education In El Salvador

Through we can't take medical students and doctors to El Salvador right now, we have been able to collaborate with Indiana University in providing continuing education units for doctors and nurses in El Salvador.

Covid-19 Mitigation Support

CoCoDA has provided over $8,000 of emergency funding for our partners in Nicaragua and El Salvador for masks, sanitizer and other Covid-19 mitigation and response resources. These materials have allowed our partners to continue their work safely. One of the crucial recipients of this support has been the Association of Midwives in Suchitoto, El Salvador.

Scholarship Programs

Even during the pandemic, we have been able to sustain and even expand our scholarship programs in Central America. The Zacataloza program is sending 8 young people to high school. The Young Rural Dreamers program will send 10 Nicaraguan students to university this year. The Youth Leadership Campaign will send 35 Salvadoran students to the University of El Salvador. In addition, we have raised $25,000 for more remodeling for the Casa Ivan Villasboa student house in San Salvador.

DONATE

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